State Opioid Response (SOR) Grant

Standard SOR End User Guide

Applies to:

WITS Version 19.9.0

WITS Customers

Last Updated August 2020

Version 4

WITS Customers

State Opioid Response (SOR) Grant

Preface

"The State Opioid Response (SOR) program aims to address the opioid crisis by increasing access to medication-assisted treatment using the three FDA-approved medications for the treatment of opioid use disorder, reducing unmet treatment need, and reducing opioid overdose related deaths through the provision of prevention, treatment and recovery activities for opioid use disorder (OUD) (including prescription opioids, heroin and illicit fentanyl and fentanyl analogs)."[1]

Intended Audience

This Standard SOR user guide has been prepared for provider agency staff members delivering SOR services to individuals. Information included will assist providers in understanding the standard WITS SOR system and the data entry requirements for the SOR grant.

System Requirements

WITS is a web-based application accessed through an Internet (web) browser using an Internet connection.

Internet Browsers

WITS is compatible with up-to-date versions of most modern Internet browsers such as:

- Apple® Safari®
- Google Chrome™
- Mozilla® Firefox®
- Windows Internet Explorer 10 or newer *(recommended)*

Note: Do not allow your Internet browser to save your password, as this information will be routinely updated.

Pop-up Blocker

Certain features in WITS, such as Snapshot and Scheduler, will open in a separate browser window when selected. Make sure your browser allows pop-ups from WITS.

Customer URL Link

Production Site: https://pa.witsweb.org/Public/

[1] Source: https://www.samhsa.gov/grants/grant-announcements/ti-18-015

Documentation Updates

Version 4 (WITS 19.9.0) (Current Version)

The following topics have been added in this documentation version.

- **GPRA Follow-up Due Summary Screen** (Part 4: GPRA Interviews on page 33)
- **GPRA Follow-up Due Detail Screen** (Part 4: GPRA Interviews on page 37)
- **GPRA Discharge Due Screen** (Part 4: GPRA Interviews on page 44)
- **Intake Close Processor** (Part 1: Customer Specific Information on page 3)
- **Prepopulate Behavioral Health Diagnoses screen with Medications from Encounter** (Part 4: GPRA Interviews on page 41 and on page 47)

Version 3 (WITS 19.8.0)

The following topics have been added in this documentation version.

- Added confirmation screen upon completing GPRA Follow up interview within window to automatically create a GPRA Discharge with the same interview information. (Part 4: GPRA Interviews, on page 43)
- Added information about **GPRA Discharge Services Received** section populated with encounter information. (Part 4: GPRA Interviews, on page 49)

Version 2 (WITS 19.6.0)

The following topics have been added in this documentation version.

- **Updated Standard SOR Workflow Diagram** (Part 1: Customer Specific Information on page 1)
- **Grant Episode Concepts** (Part 1: Customer Specific Information on page 2)
- **GPRA Interviews** (Part 4: GPRA Interviews on page 27)
  - GPRA Intake Interview
  - GPRA Follow Up Interview
  - GPRA Discharge Interview

Contents

Note: Notes contain information for users to take note of, as the information may affect what the user does with the system.

Tip: Tips contain information helpful to the user, such as providing an easier way to do something.

Important: Typically, these highlight details for the user to consider or review before continuing with a step or action within the system. This information may warn the user about possible error messages that may occur if the instructions are not followed, or it may indicate/remind users of additional actions to take before proceeding, such as downloading required software.

Part 1: Customer Specific Information

WITS allows providers to easily enter information for individuals and services they receive as part of the SOR program.

- The initial provider agency that works with an individual will create the client profile, intake, and enroll the client into a SOR program.
- If the provider agency needs to refer an individual to another provider for services, WITS has an automated consent/referral process that is HIPAA/42 CFR Part 2 compliant. Once the referred-to service provider accepts the referral, WITS will automatically set up the client profile, intake and SOR program enrollment.
- The initial agency can enter GPRAs or the referred-to agency can enter the GPRAs. WITS will ensure that there are no duplicate GPRAs created for individuals enrolled in the SOR program. Also, if the providers have entered encounters, WITS will map those encounters to the SOR discharge GPRA.

Workflow Diagram

The following diagram illustrates the standard SOR workflow process.

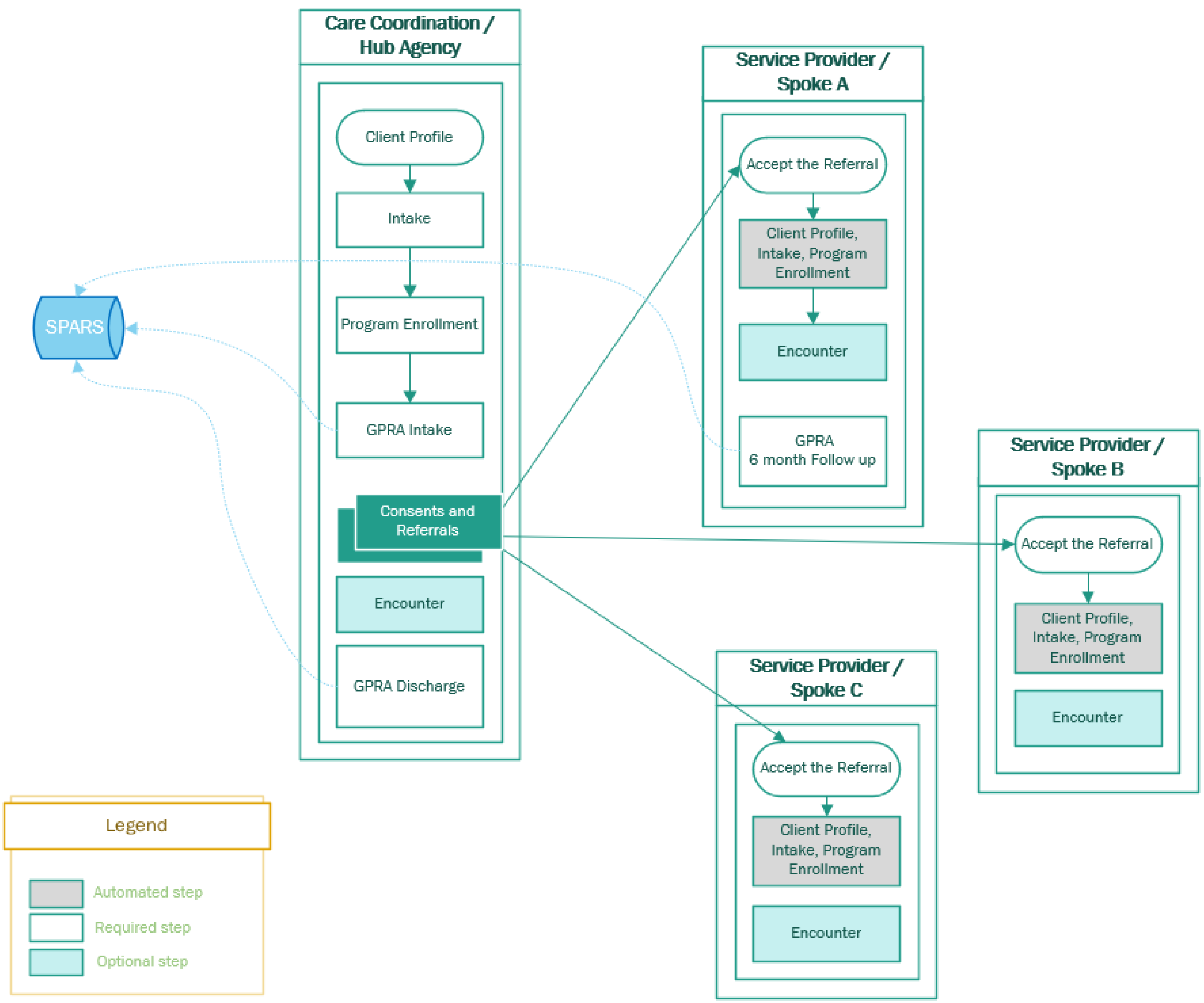


Figure 1-1: Standard SOR Workflow Diagram

Grant Episode Concepts

Where:* *Agency > Agency List > Facility List > Programs

Background

When a client's GPRA interviews are completed, they are sent to SPARS. Each type of GPRA Interview (Intake, 6-Month follow up, Discharge) is sent automatically as an upload from WITS. If the same type of GPRA is sent twice (for example, if two GPRA Intakes are completed), SPARS will inactivate the first GPRA Intake interview when the second is completed. In order to prevent older interviews being inactivated in error, WITS now has a grant episode.

Grant Episode Concepts

Table 1-1: Grant Episode Events and Information

Event	Information
GPRA Menu Item	The ability to enter a GPRA in WITS only becomes available when a WITS client program enrollment (CPE) exists where the associated program has a value in the Grant field and the end user has the GPRA (Full Access) security access role.
Grant Episode	This allows the client to be referred to other agencies and have the same grant episode. If Agency A completes the GPRA Intake and then refers the client to Agency B, Agency B will be able to continue the grant episode and complete the GPRA 6-Month Follow Up and GPRA Discharge interviews for the same client. This will prevent another agency from inadvertently inactivating the previous GPRA Intake because the grant episode will remain assigned to this client in other agencies. 1. The Grant Episode is created and put into a 'Pending' status when the Client Program Enrollment (CPE) is created for a program with a Grant field value. 2. The Grant Episode follows the client's UCN throughout the process of creating GPRAs. 3. The 'Pending' grant episode will become 'Active' once the GPRA Intake interview is completed. 4. It will remain active through the 6-Month Follow-Up and Discharge interviews. 5. Once all 3 interviews are completed, the Grant Episode will have a status of 'Closed.' 6. Once the Grant Episode is 'Closed', a new 'Pending' Grant Episode can then be created if the client needs treatment again. 7. The WITS Administrator could change Grant Episode from 'Active' to 'Inactive' (this can be done upon creation of a client program enrollment within a different agency)

WITS Administrator Process

Use Case: Client with GPRA intake at one provider goes to another provider <u>without</u> a WITS consent/referral

1. If the client goes to another provider who attempts to add a Client Program Enrollment in SOR and that client/UCN already has an 'active' grant episode, the system will prohibit this.
   - The provider/user will be presented with a WITS error message:

There is a problem creating this client program enrollment record. Please contact your SCA administrator to resolve this conflict.

2. The WITS Administrator would then be able to determine if the client program enrollment can be added within the agency by either continuing the existing episode or creating a new episode (which will inactivate the previous episode)

Intake Close Processor

For customers only using SOR, the **Intake Close Processor** is a scheduled task that runs every night to automatically close client intakes. Client intakes will be closed when all Client Program Enrollments are for a closed or inactive grant episode and there has been no activity within that client intake (no encounters saved or updated) for a certain number of days. The default number of days is set to 45, but the number can be changed in a site's configuration.

Important: The Intake Close Processor applies to SOR only customers.

Part 2: Client Setup

Search for a Client

Where: Client List Screen

Before creating a new client record, search for your client to make sure the client is not already in WITS.

1. To view clients within your agency, click on the **Client List** menu item. A blank Client List screen will appear.
2. Use the fields in the **Client Search** section to narrow your results.

Tip: When searching for a client, try to use unique information, such as birthdates or social security numbers, if possible. You can also enter a partial name (or other field) followed by a "*". This is called a **wild card search**. For instance, if you search for Last Name of "Smit*", the search results will display people with the last name of "Smith", "Smitty", "Smithson", etc.

3. After selecting from the search fields, click **Go** to view the results.

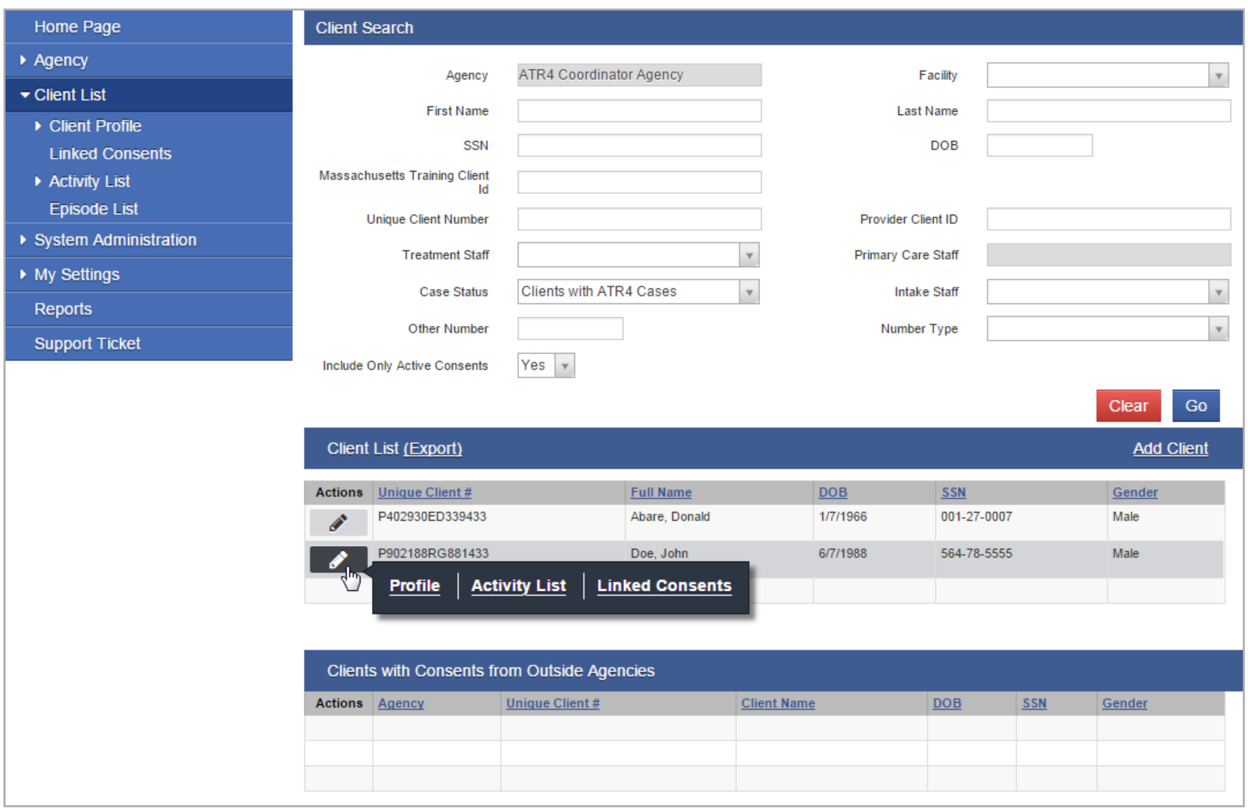


Figure 2-1: Client List screen, Action links

4. Look for your client in the **Client List**. If you find the right person, view their profile by pointing to the pencil icon in the Actions column and clicking the **Profile** link. If you do not find your client, you can create a new client record by clicking the <u>Add Client</u> link.

Client Search Tips

Client Name or Number

Use a client's nickname or alternate names in the **First Name** or **Last Name** fields.

Use an **asterisk** (*****) to perform a wildcard search.

Examples:

- Find clients whose last name starts with "Jon": Jon*

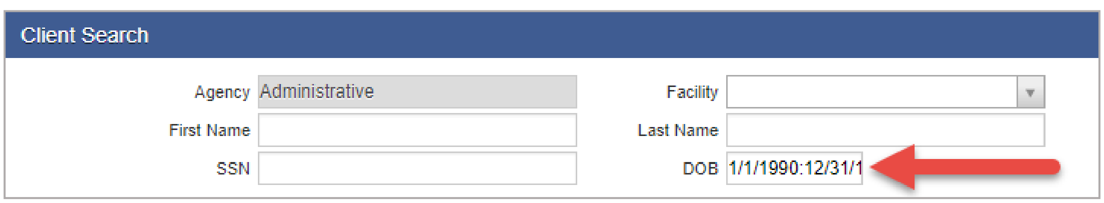
- Search by the last 4 digits of a client's SSN: *1123

Client Birthday or Age

Search within a timeframe by separating the two dates with a **colon** (**:**). Search for clients born after a certain date with a **greater than sign** (**>**). Search for clients born before a certain date with a **less than sign** (**<**).

Examples:

- Find clients born in the year 1990: 1/1/1990**:**12/31/1990



- Find clients born after a certain date: >12/30/1959

Create Client Profile

Where:* Client List > *Client Profile

To add a new client to the system, follow the steps below.

> **Note**: Please search for each client before creating a new record.

1. On the left menu, click **Client List**.
2. On the Client List screen, click **Add Client**.

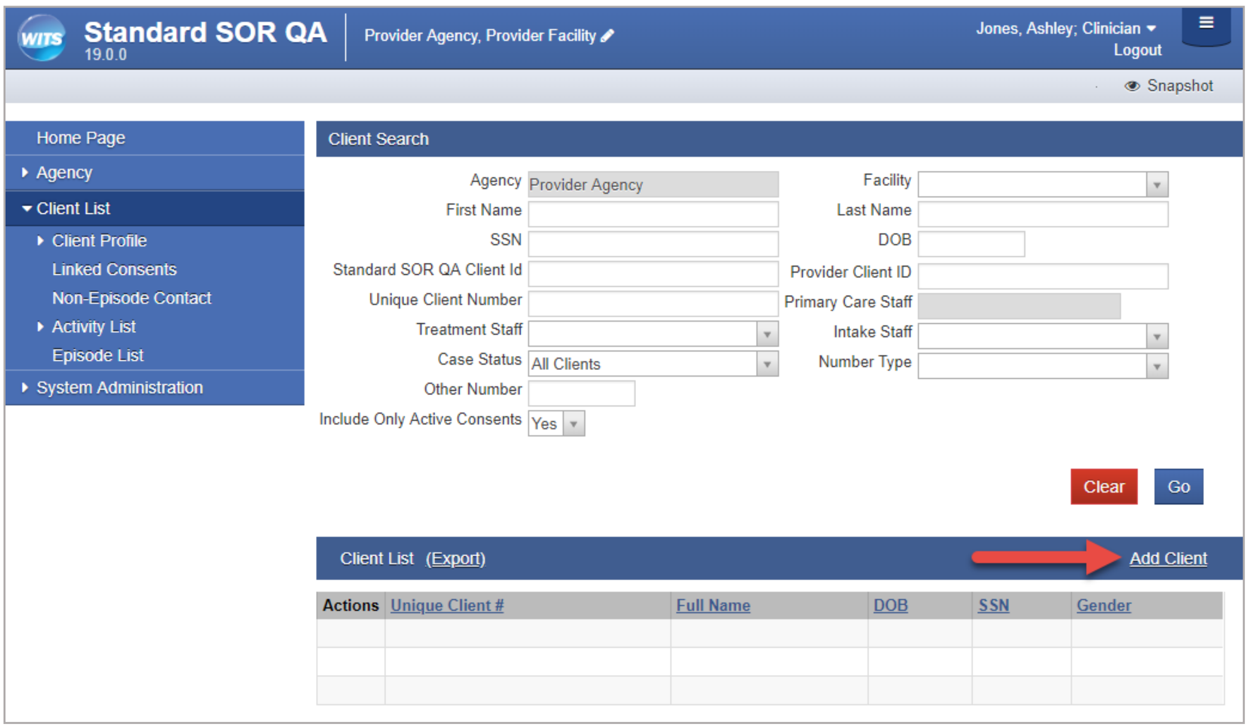


Figure 2-2: Client Search/List screen; Add Client link

3. On the **Client Profile** screen, enter the required client information. See the table below for information on each field.

> **Important**: When adding new clients to the system, review the Client Profile fields for accuracy before saving the screen. Once the Client Profile screen is saved, a Unique Client Number (UCN) is created based on the data provided. It is important to enter client information correctly to avoid duplicate client entry in the future.

Table 2-1: Client Profile fields

Field	Description
Current First Name	Type the client's current first name.
Middle Name	(Optional)
Current Last Name	Type the client's current last name.
Mother's Maiden Name	(Optional)

Field	Description
Suffix	(Optional)
Birth First Name	Type the client's birth first name.
Birth Last Name	Type the client's birth last name.
Gender	Select the client's gender from the drop-down list.
DOB	Enter the client's date of birth.
SSN	Type the client's Social Security Number. If the Social Security Number is not Known, enter all 0's.
Driver's License and State	(Optional) Type the number and then select the State from the drop-down list.
Has paper file	(Optional) Select Yes or No. Field defaults to Yes.
Provider Client ID	(Optional)

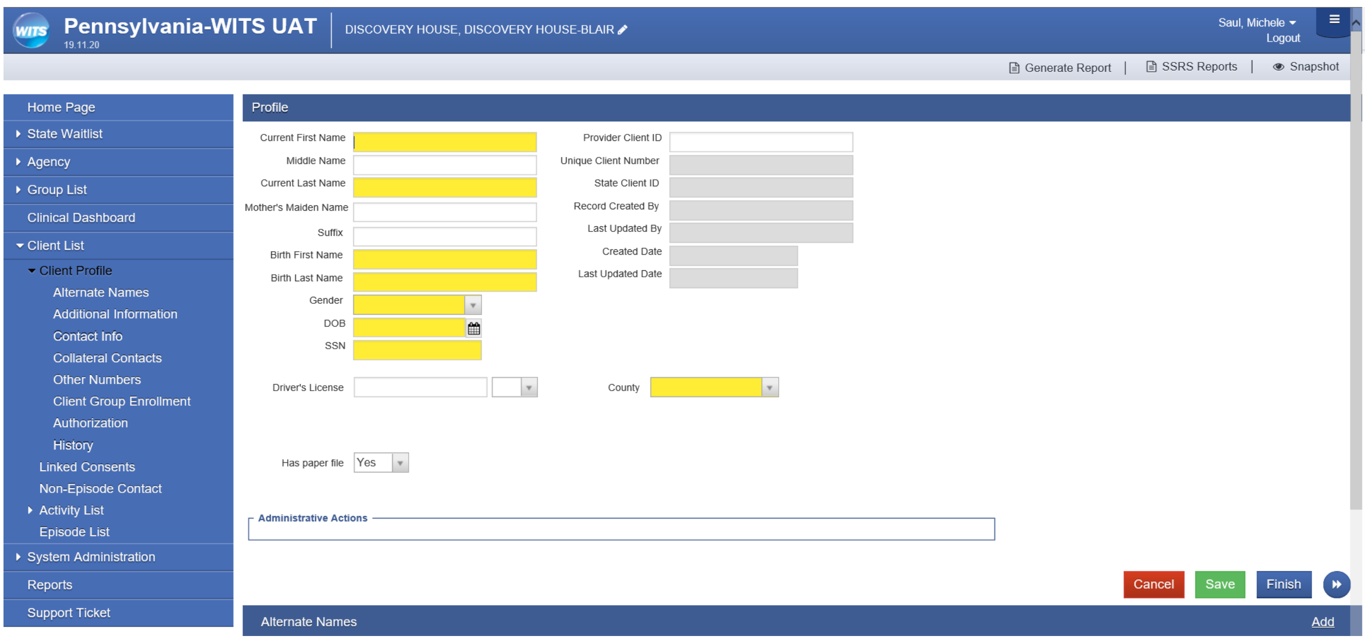


Figure 2-3: Client Profile screen

4. Click **Save**.

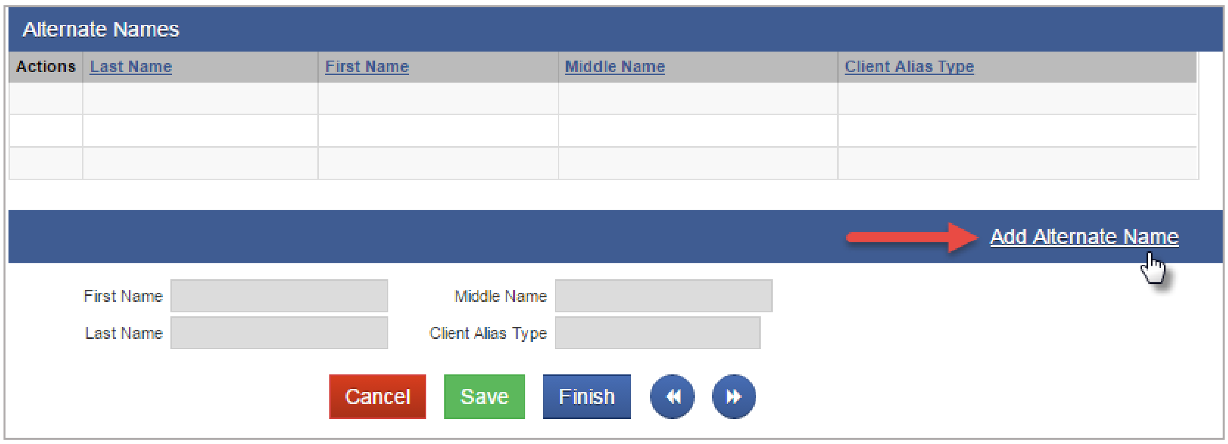
5. Click the **right-arrow** to move to the **Alternate Names** screen.

Alternate Names

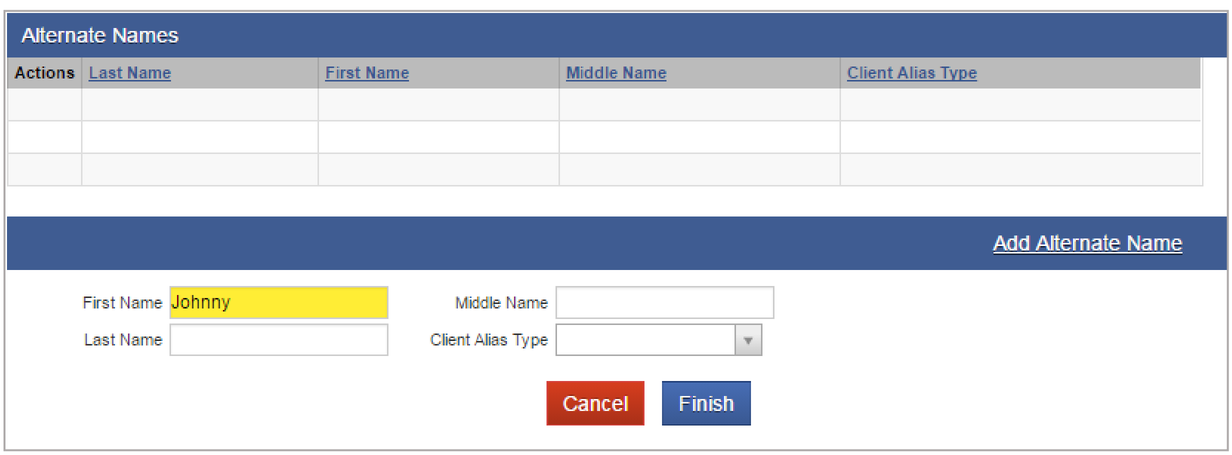
The client's nickname or street name may be entered on this screen

Tip: Alternative names can also be used to search for the client's profile in the future. On the Client Search screen, type the client's alternative name in the First Name and/or Last Name fields.

1. On the Alternate Names screen, click **Add Alternate Name**, and the bottom half of the screen becomes editable.



2. Complete at least the **First Name** field.



3. Click **Finish**. The name will now appear in the list at the top of the screen.

4. From the Alternate Names screen, click the **right-arrow** button to open the **Additional Information** screen.

Additional Information

1. On the **Additional Information** screen, complete the light-yellow fields.

Table 2-2: Additional Information screen

Field	Description
Ethnicity	Select from the drop-down list.
Selected Races	Select one or more races.
Have you ever served in the Armed Forces, in the Reserves, or in the National Guard?	Select from the drop-down list.

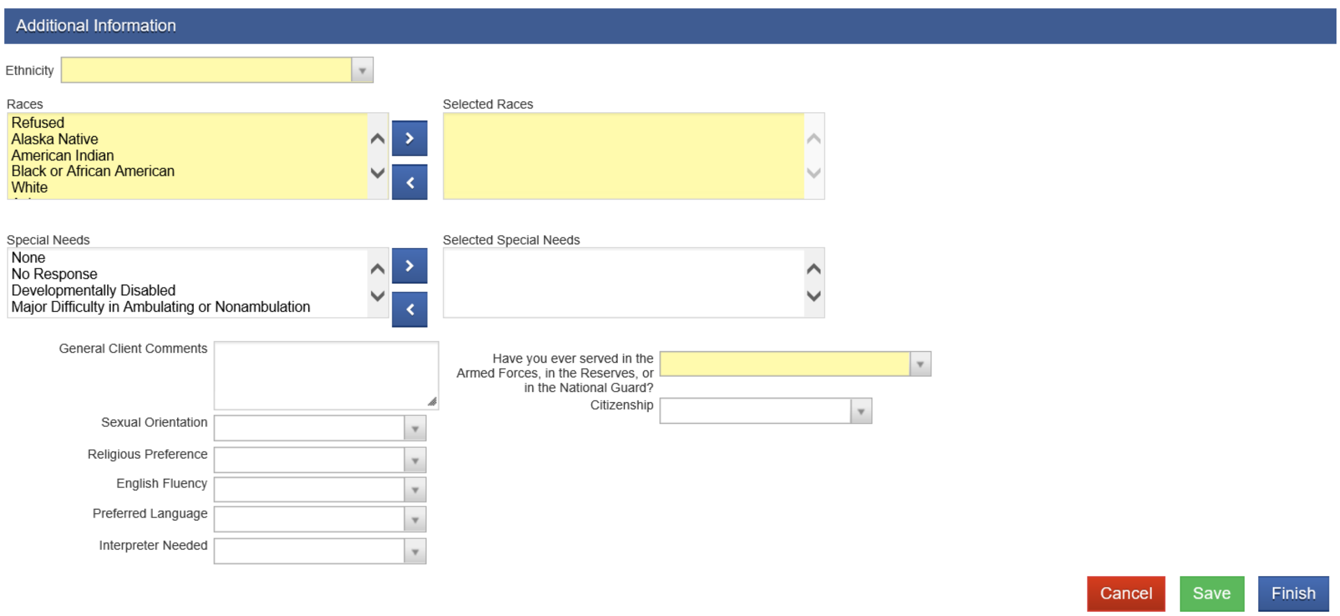


Figure 2-4: PA-WITS SOR screen

2. When complete, click **Save**, then click the **right-arrow** button to open the **Contact Info** screen.

Contact Info

Tip: Enter the client's contact information on this screen to help locate the client for follow-ups.

1. On the **Contact Info** screen, a phone number can be entered for the client.

2. To enter an address, click **Add Address**. This will open the Address Information screen.

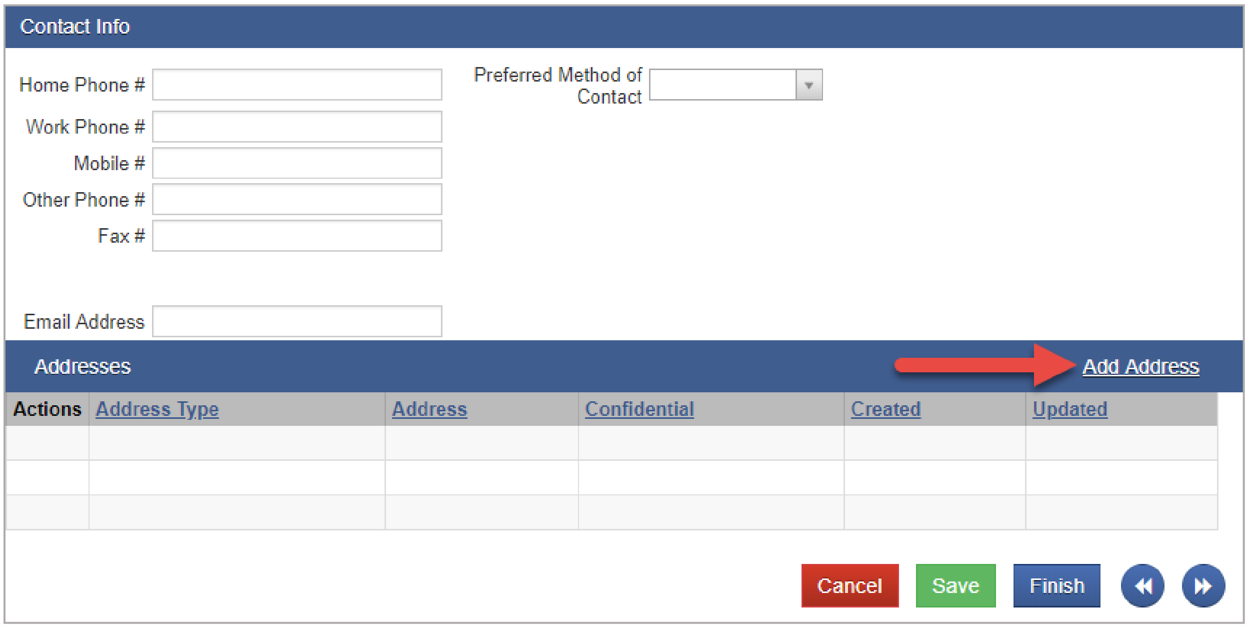


Figure 2-5: Contact Info screen

3. Enter the client's Address Type, Address line 1, City, State, and Zip Code.

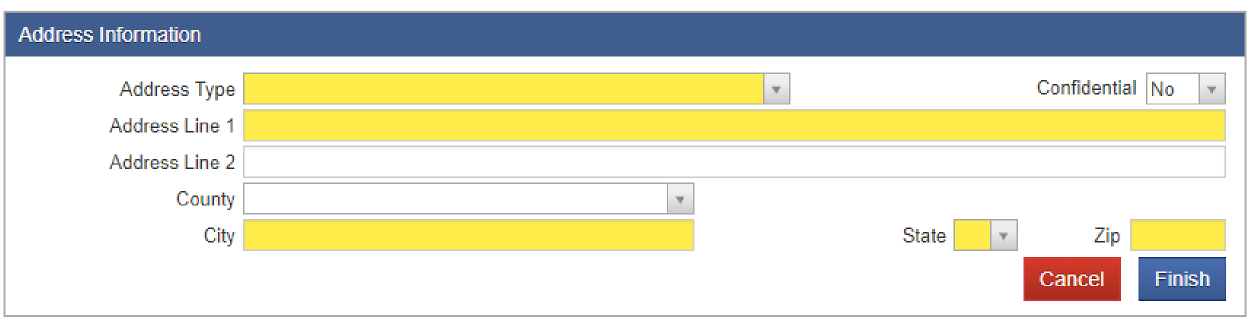


Figure 2-6: Address Information screen

4. When complete, click **Finish**, and the client's address information will show up on the Contact Info screen. You may enter several addresses for a client. If a client has a new address, update the Address Type of the current address record to "Previous", then create a new address.

5. From the **Contact Info** screen, click the **right-arrow** button to open the **Collateral Contacts** screen.

Collateral Contacts

Tip: Enter any collateral contacts for the client on this screen to help locate the client for follow-ups.

1. On the **Collateral Contacts** screen, click the **Add Contact** link.

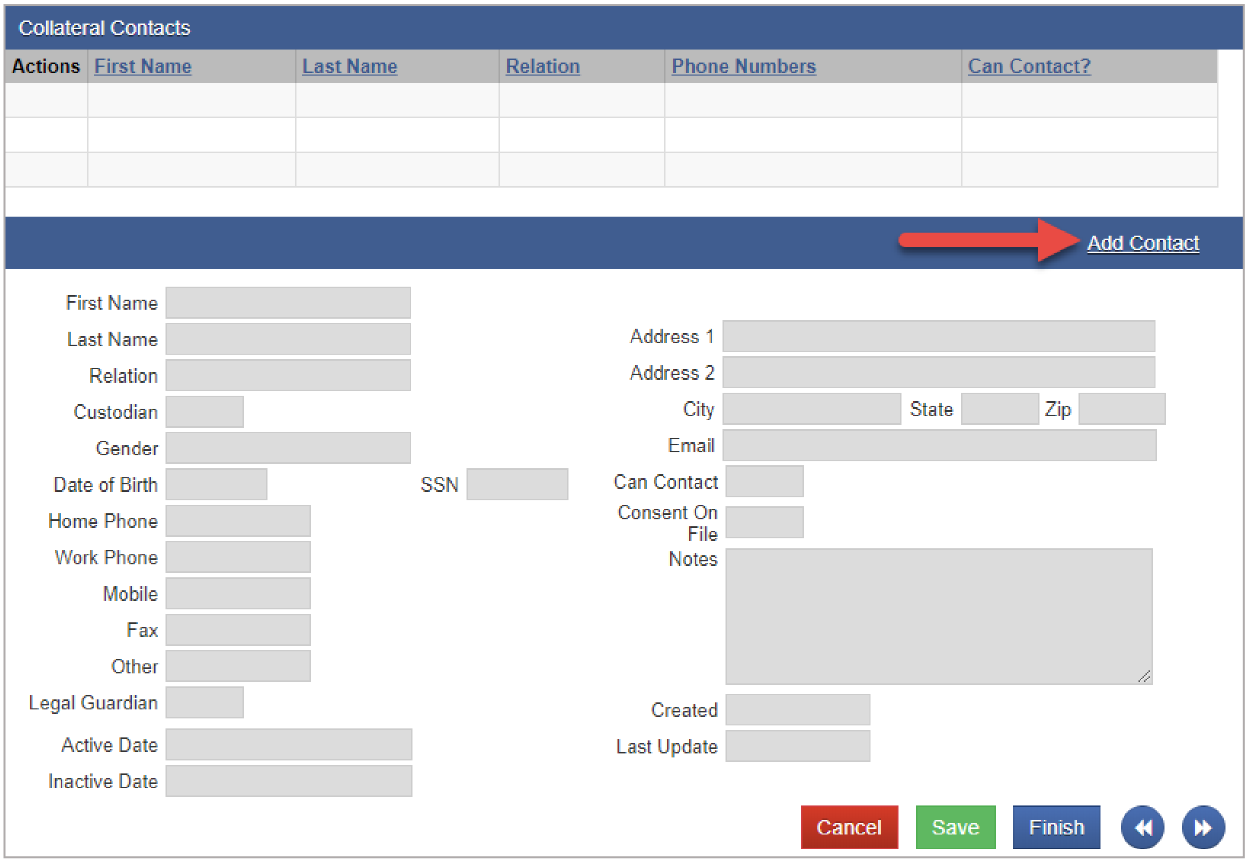


Figure 2-7: Collateral Contacts screen, click Add Contact

2. Enter the required client information. See the table below for information on the required fields.

Table 2-3: Collateral Contacts required fields

Field	Description
First Name	Type the contact's first name.
Last Name	Type the contact's last name.
Relation	Select the collateral contact's relation to the client from the drop-down menu.
Address, **City**, **State**	Type the contact's address information
Can Contact	Select Yes or No.
Consent On File	Select Yes or No.

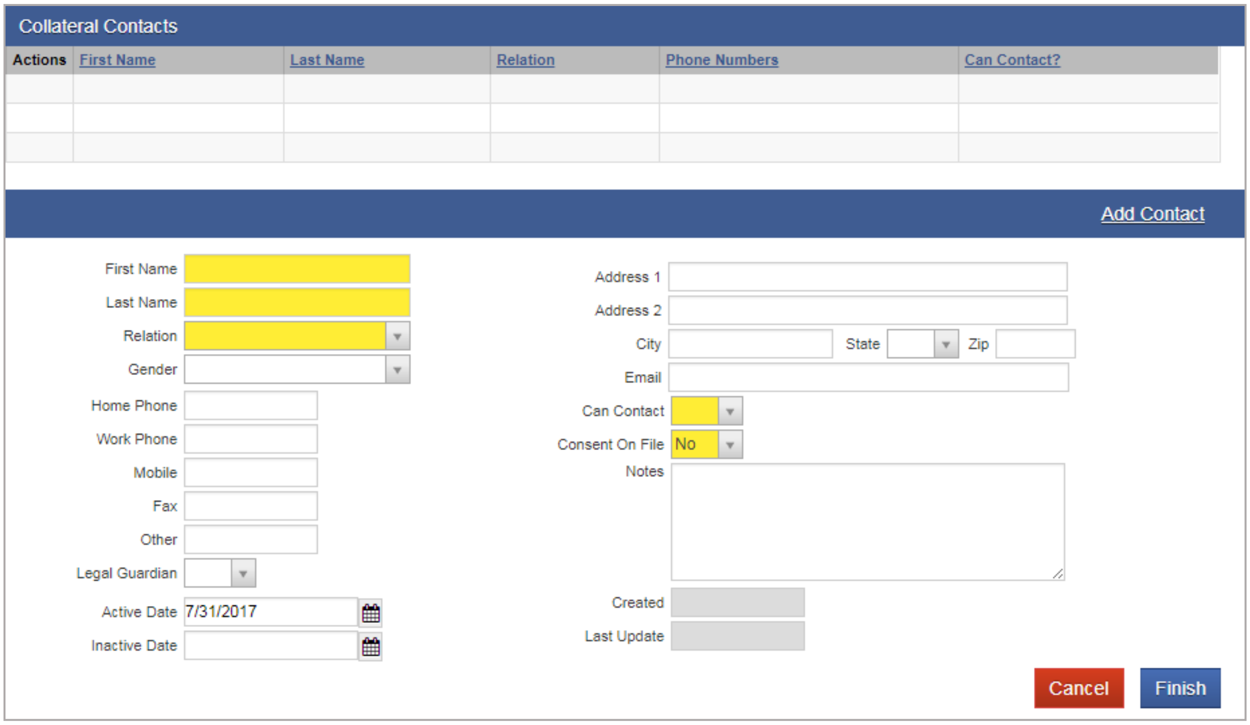


Figure 2-8: Add Collateral Contacts screen

3. When complete, click **Finish**. The collateral contact name(s) will be displayed in the list section of the screen.

4. From the **Collateral Contacts** screen, click the **right-arrow** button to open the **Other Numbers** screen.

Other Numbers

In this section, users can add additional identifying numbers for a client, such as a court case number.

1. On the **Other Numbers** screen, click the **Add Other Number** link. The bottom half of the screen now becomes editable.
2. Fill in information such as, Number Type, Number, Relation, and Address of the contact.

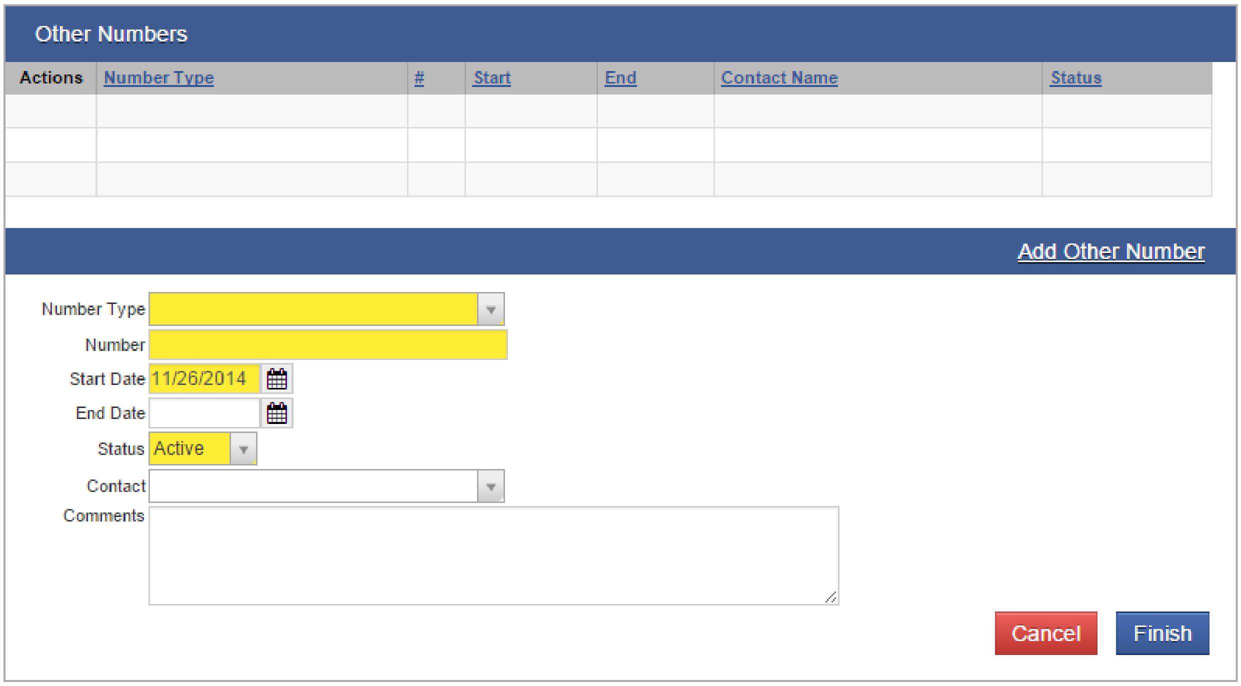


Figure 2-9: Other Numbers screen

3. The **Contact** dropdown box will display the names of any saved Collateral Contacts from the previous screen. If the name of the Collateral Contact is not present, click on the **Collateral Contacts** screen to add a new record.

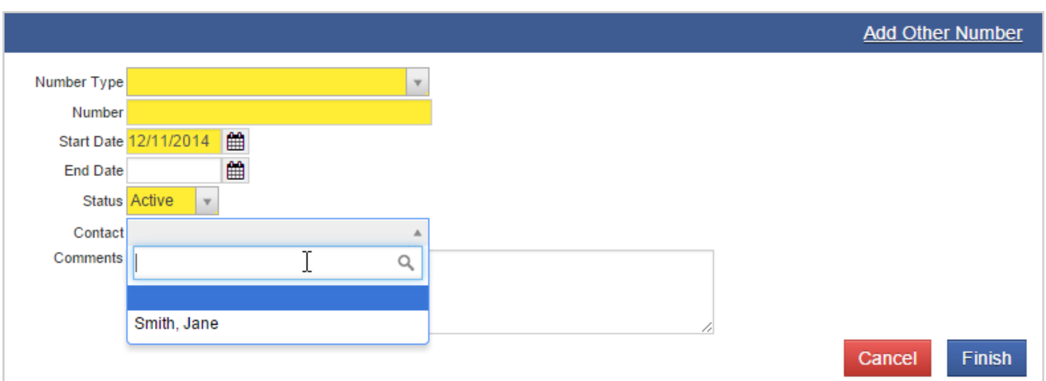


Figure 2-10: Other Numbers screen, saved collateral contact

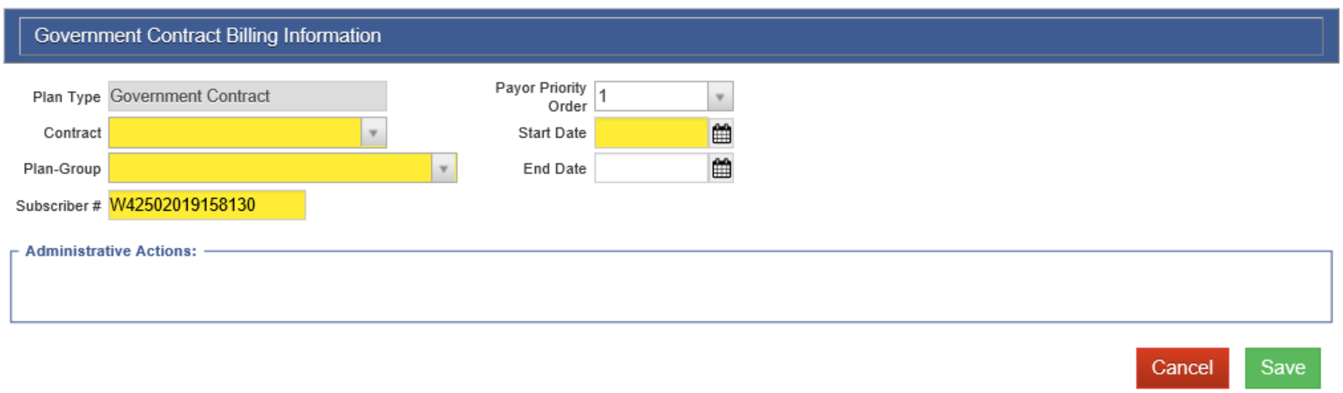
4. When complete, click **Finish**. The names now show up in the table on top of the screen.

Client Group Enrollment

A client group enrollment (CGE) must be entered for each client. This will identify the funding source for the client. If the client is not being funded by an SCA, there is a "No SCA" option that can be selected. The CGE can be updated as funding sources change.

1. Click **Add Government Contract Enrollment**

2. Select the Contract, or funding source, from the drop-down menu. The options will be an SCA that the provider contracts with or No SCA.
The Plan-Group field will auto populate with the appropriate information based on the Contract selected.
The Subscriber # will auto populate with the client's UCN.



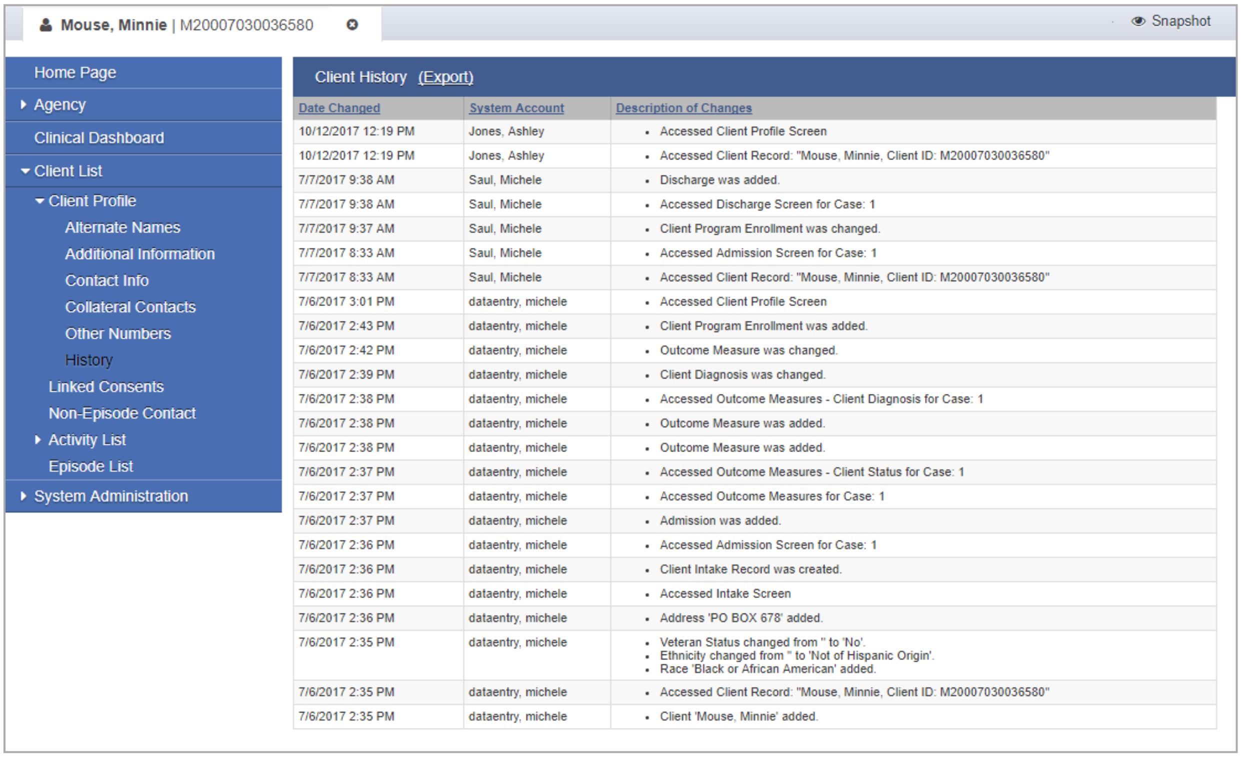
3. Enter the Start Date, which is the date the selected funding source will begin covering services.

4. Click **Save**

5. On the Payor List, click **Finish**, and you will be returned to the Client Search.

History

The **History** sub-menu displays a list of all changes that have been made to the client information as well as any access to this client's record. It lists the date, the staff person, and a description of the access or change.



Date Changed	System Account	Description of Changes
10/12/2017 12:19 PM	Jones, Ashley	• Accessed Client Profile Screen
10/12/2017 12:19 PM	Jones, Ashley	• Accessed Client Record: "Mouse, Minnie, Client ID: M20007030036580"
7/7/2017 9:38 AM	Saul, Michele	• Discharge was added.
7/7/2017 9:38 AM	Saul, Michele	• Accessed Discharge Screen for Case: 1
7/7/2017 9:37 AM	Saul, Michele	• Client Program Enrollment was changed.
7/7/2017 8:33 AM	Saul, Michele	• Accessed Admission Screen for Case: 1
7/7/2017 8:33 AM	Saul, Michele	• Accessed Client Record: "Mouse, Minnie, Client ID: M20007030036580"
7/6/2017 3:01 PM	dataentry, michele	• Accessed Client Profile Screen
7/6/2017 2:43 PM	dataentry, michele	• Client Program Enrollment was added.
7/6/2017 2:42 PM	dataentry, michele	• Outcome Measure was changed.
7/6/2017 2:39 PM	dataentry, michele	• Client Diagnosis was changed.
7/6/2017 2:38 PM	dataentry, michele	• Accessed Outcome Measures - Client Diagnosis for Case: 1
7/6/2017 2:38 PM	dataentry, michele	• Outcome Measure was added.
7/6/2017 2:38 PM	dataentry, michele	• Outcome Measure was added.
7/6/2017 2:37 PM	dataentry, michele	• Accessed Outcome Measures - Client Status for Case: 1
7/6/2017 2:37 PM	dataentry, michele	• Accessed Outcome Measures for Case: 1
7/6/2017 2:37 PM	dataentry, michele	• Admission was added.
7/6/2017 2:36 PM	dataentry, michele	• Accessed Admission Screen for Case: 1
7/6/2017 2:36 PM	dataentry, michele	• Client Intake Record was created.
7/6/2017 2:36 PM	dataentry, michele	• Accessed Intake Screen
7/6/2017 2:36 PM	dataentry, michele	• Address 'PO BOX 678' added.
7/6/2017 2:35 PM	dataentry, michele	• Veteran Status changed from '' to 'No'. • Ethnicity changed from '' to 'Not of Hispanic Origin'. • Race 'Black or African American' added.
7/6/2017 2:35 PM	dataentry, michele	• Accessed Client Record: "Mouse, Minnie, Client ID: M20007030036580"
7/6/2017 2:35 PM	dataentry, michele	• Client 'Mouse, Minnie' added.

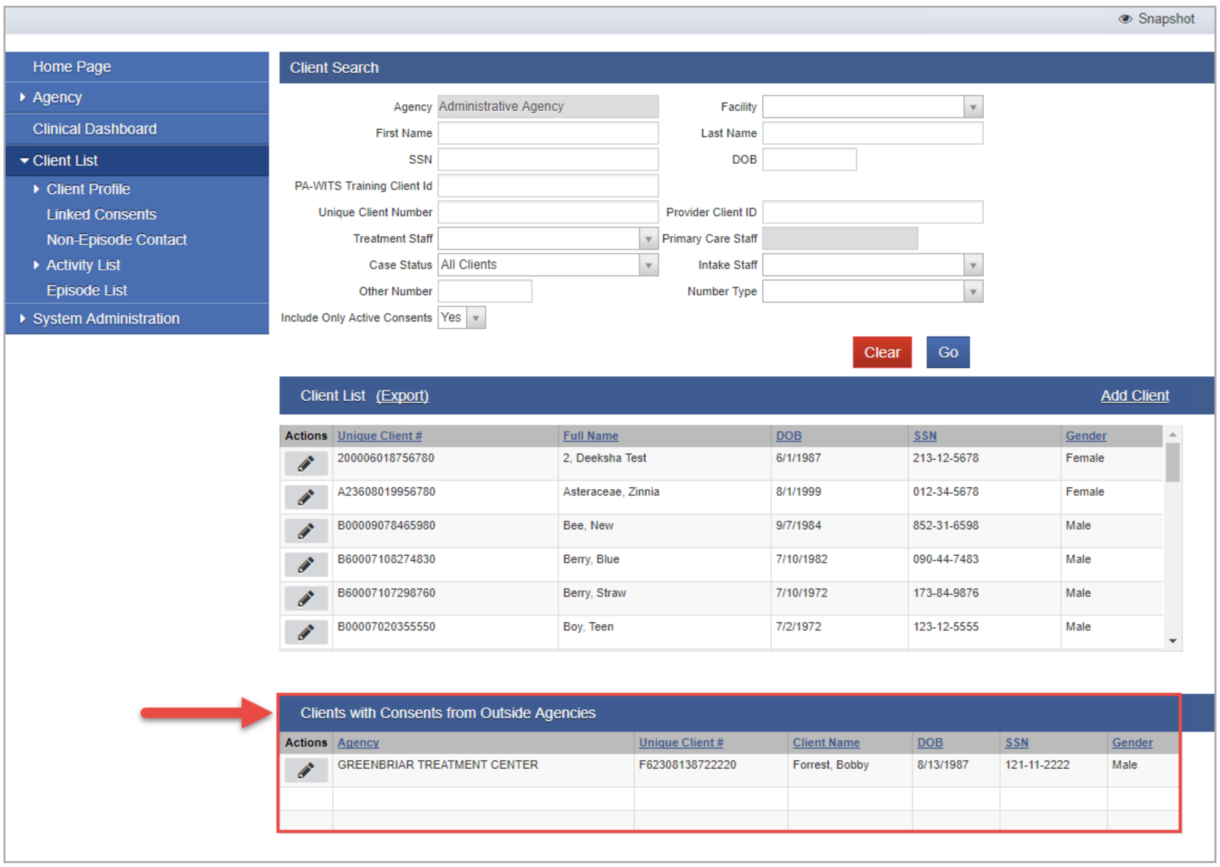
Figure 2-11: Client History screen

Linked Consents

*Where: **Client List** > Clients with Consents from Outside Agencies*

Each time another agency consents client information to your agency, a row will be displayed on the "**Clients with Consents from Outside Agencies**" section of the **Client List** screen. Always look at the linked consents first to make sure you don't already have that client entered.

If the consent is sent along with a referral and the referral is accepted at the referred to agency, users with a Clinical Supervisor role may manually link and unlink consents. This action is available when it is clear that a client with consented information is in fact the same person as a client that exists in the agency. They may not have been automatically linked because the names or other identifying information may have been different in the sending agency than they are in the receiving agency.



For example:

A client named "Bobby" is referred into your agency from an outside agency. Your agency already has a record for a client named "Robert". The Linked Consents screen allows you to compare the New/Referred Client Information (Bobby) with the Existing Client Information (Robert). Using this screen, you can tell that Robert and Bobby are the same person and these two profiles can be linked together so the same client won't have two different client profiles within the same agency.

Link to Consented Client

1. On the left menu, click **Client List** and then click **Go**.

2. In the **Clients with Consents from Outside Agencies** section, hover over the Actions column and click **Link**.

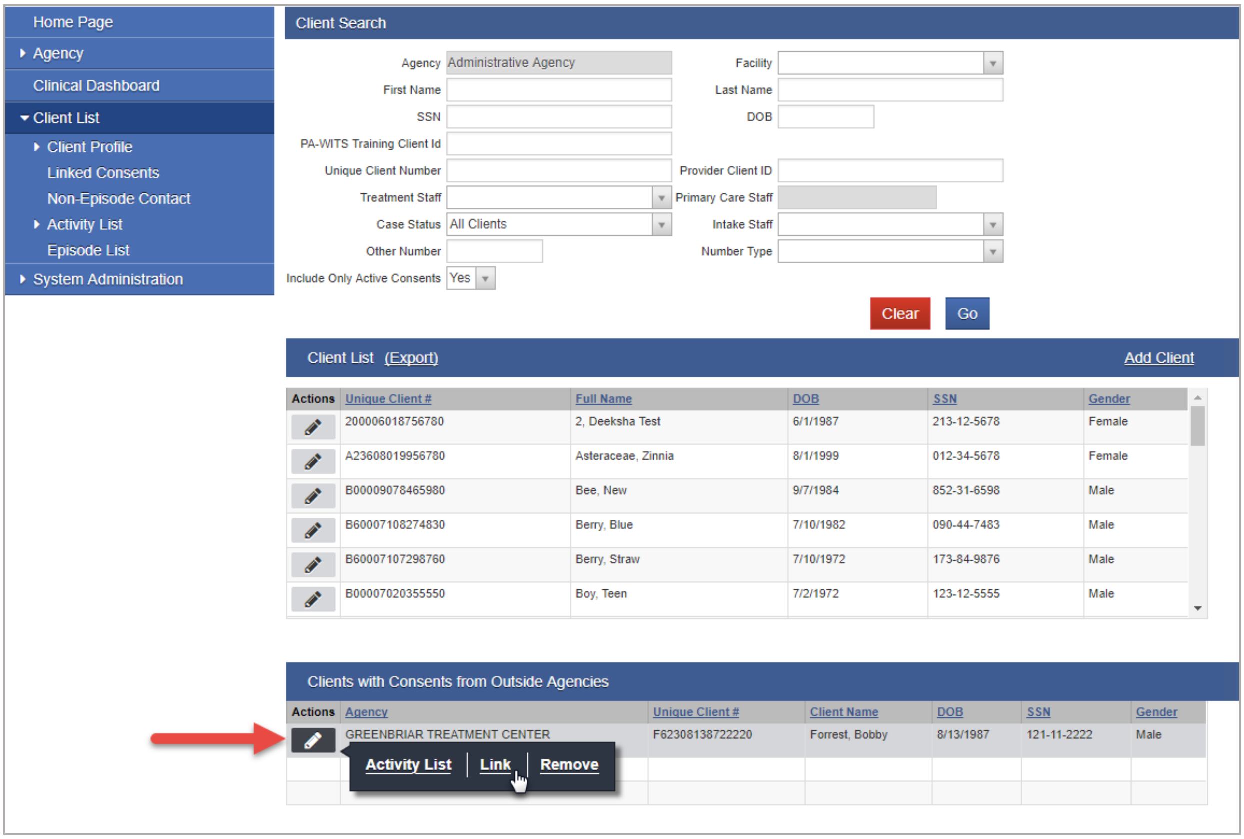


Figure 2-12: Client List screen, Clients with Consents from Outside Agencies section, Link action item

3. The **Link Client Search** screen will appear and the Consented Client information is displayed as read-only fields.

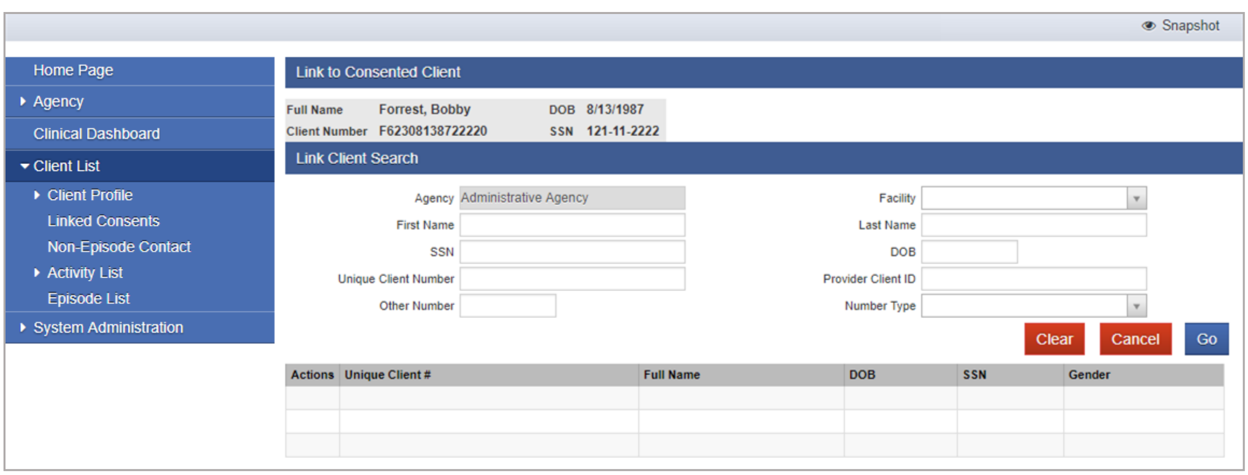


Figure 2-13: Link Client Search screen

4. Use the search fields to find a client with similar information. It is helpful to copy and paste some of the consented client's information into the search fields. The example in Figure 2-14 uses the Consented Client's Unique Client Number in the search field.

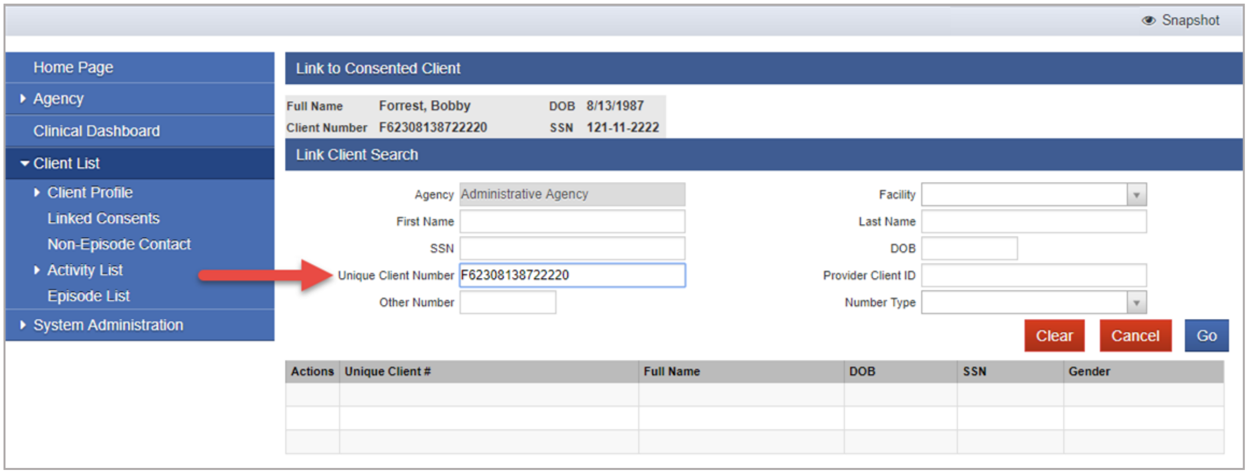


Figure 2-14: Link Client Search screen, search by Unique Client Number

5. After filling out one or more search fields, click **Go** and then review the search results.

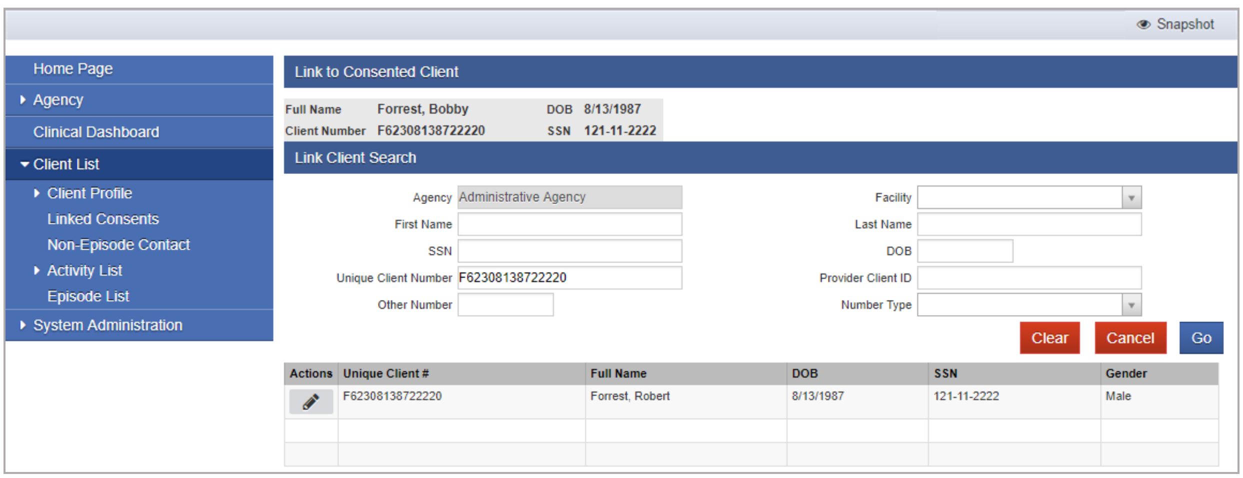


Figure 2-15: Link Client Search screen with search results

6. If the information in the search results matches the Consented Client information, hover over the Actions column and then click **Link**.

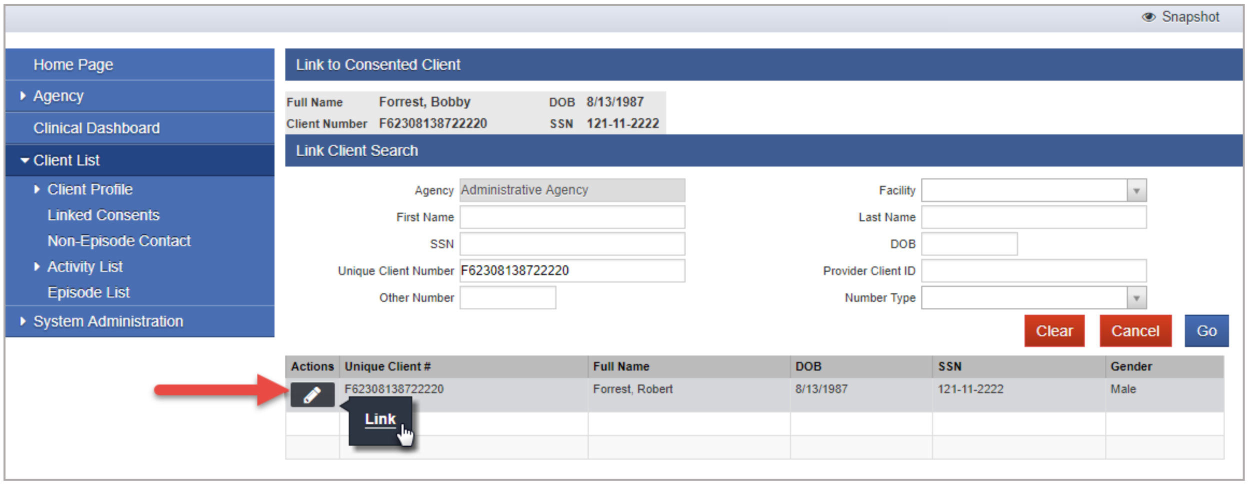


Figure 2-16: Link Client Search screen, Link Consent record

7. Click **Yes**.

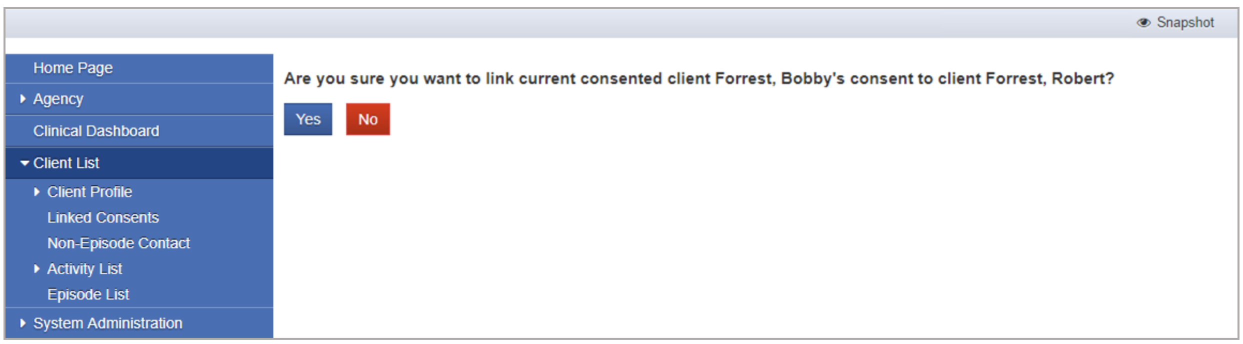


Figure 2-17: Are you sure you want to link current consented client to the consent client

8. The client's Linked Consent screen will now display the consent record from the other agency.

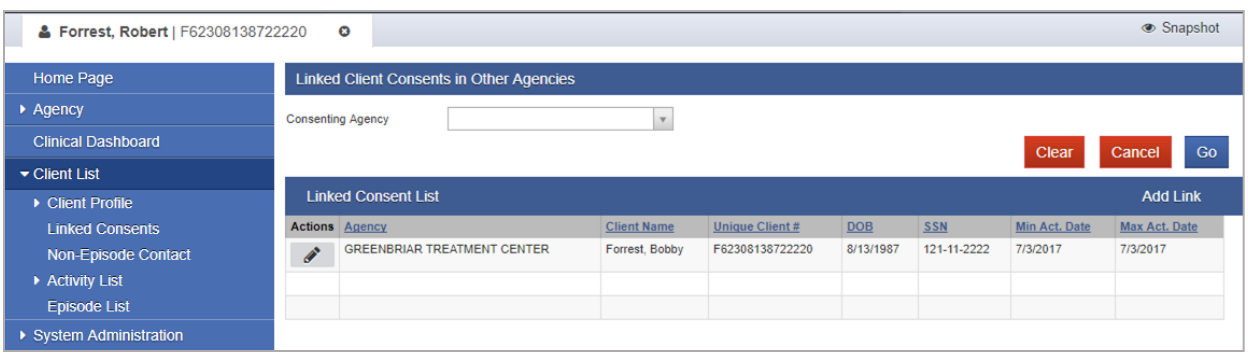


Figure 2-18: Linked Consents screen

Part 3: Client Intake and Program Enrollment

Client Activity List

It is important to understand that data collection in WITS happens within a Client's Activity List. The Case, or Episode of Care, is the container that holds all client activities. The beginning and end of a client's Episode of Care are recorded on the Intake transaction, where the Intake Date starts the Episode and the Intake Date Closed marks the end of the Episode (these fields are shown in *Figure 3-6: Intake Case Information screen* on page 24).

The concept diagram below illustrates how this data collection is structured within the client Activity List. This Activity List is comprised of two (2) primary nested containers: Episode (e.g., Case, or Intake), and Program. The double lines connecting the Program container represent multiple program enrollments, which are allowed within a single Episode. In the diagram, arrows denote the sequence of progressing through each container.

When an Episode of Care ends for a client, this signifies that the client is no longer receiving services. It's possible for that client to return at a future date.

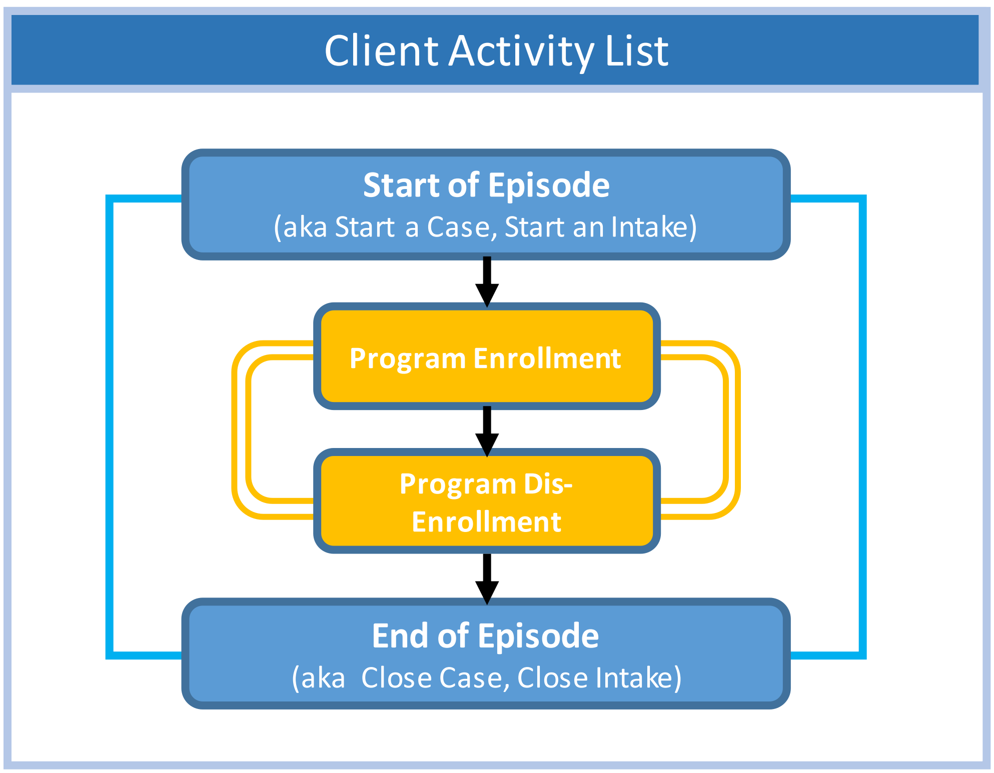


Figure 3-1: Concept Diagram of Data Collection Structure within Client Activity List

The **Client Activity List** can serve as a "dashboard' view for information that has been collected for a given client within an Episode. Each Activity on the Activity List has a status to help the end user determine if that activity is "Complete" or "In Progress". When an activity is "In Progress", a **Details** link is available which displays the information needed to complete the activity.

Certain client activities must be complete before you can proceed to a following activity. Validation rules will guide you throughout the workflow as you enter new data.

To access items within the Activity List, a client must be selected first.

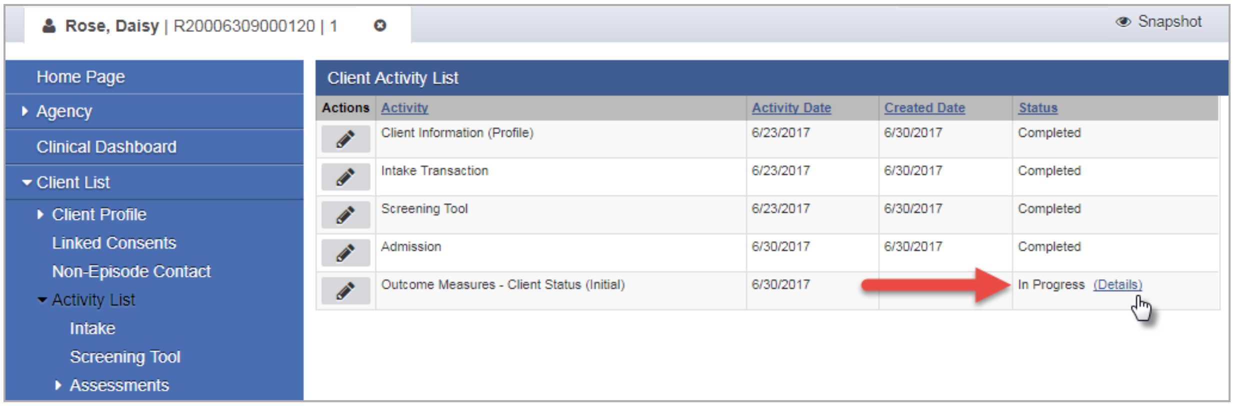


Figure 3-2: Client Activity List, Details link

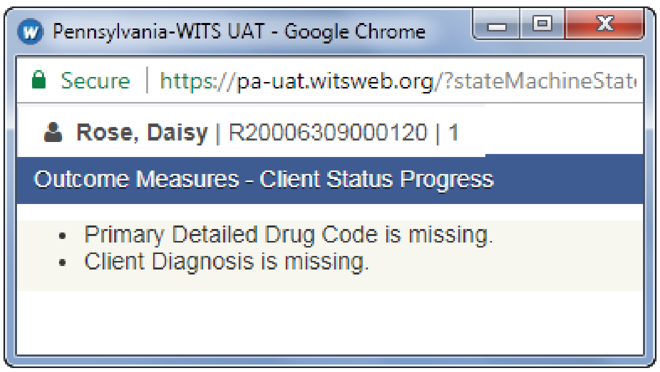


Figure 3-3: Details link, list of missing information

Some Client Activities do not have a concept of being complete. For those activities, the Status will be listed as Not Applicable.

Start New Episode (New Clients)

***Where:* Client List > Activity List > Episode List**

In WITS, all items located in a client's Activity List are based upon an active Episode of Care. In the screen capture below, note the Activity List in the left menu only displays one item, "Episode List". An episode must be created before accessing other items in the client's Activity List.

To start a new episode of care for a client, follow the steps below.

1. On the left menu, click **Episode List**.
2. Click the **Start New Episode** link.

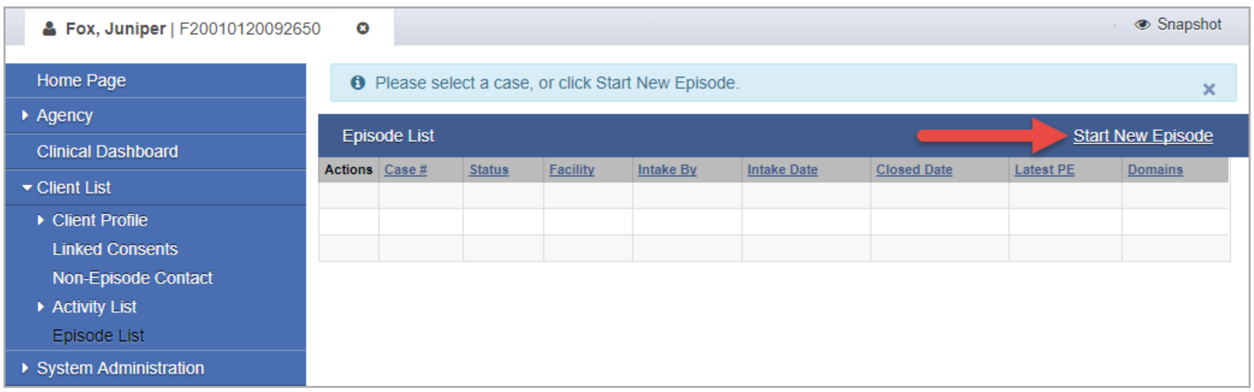


Figure 3-4: Episode List screen, Start New Episode link

If the client profile is missing certain information, such as an Address or fields on the Additional Information screen, a New Episode cannot be created and an error message will appear, as shown in Figure 3-5.

Figure 3-5: Episode List screen, Error Message

If the client profile is complete, clicking **Start New Episode** will open the **Intake Case Information** screen, as shown in Figure 3-6: Intake Case Information screen.

(Continue to next section)

Intake

Where:* *Client List* > *Activity List* > *Intake

Once an episode of care has been created (see above section), complete the client's intake.

1. On the Intake Case Information screen, complete the fields as shown in the table below.

Table 3-1: Intake Case Information Fields

Field	Description
Intake Facility	Pre-populates with the current facility location.
Intake Staff	Pre-populates with the current staff member name.
Initial Contact	Select from the drop-down list.
Case Status	Defaults to "Open Active".
Initial Contact Date	The date when the Client first reached out for treatment.
Intake Date	Enter the client's intake date, (which also marks the beginning of the client's Episode).
Source of Referral	Select from the drop-down list.
Funding SCA	Pre-populates based upon Client Group Enrollment
Referral Contact	(Optional) Select from a list of the client's collateral contacts.
Pregnant	Is the client pregnant at the time of admission? Complete if applicable.
Injection Drug User	Select Yes or No.
Problem Area	(Optional)
Presenting Problem (In Client's Own Words)	(Optional)
Special Initatives	Required.
Inter-Agency Service	(Optional)
Selected Domains	This field will be pre-populated and read-only if there is only one domain associated with the agency. If the agency has multiple domains, select the appropriate domain(s) for the client.
Date Closed 	The Date Closed field is used to mark the end of the client's Episode.

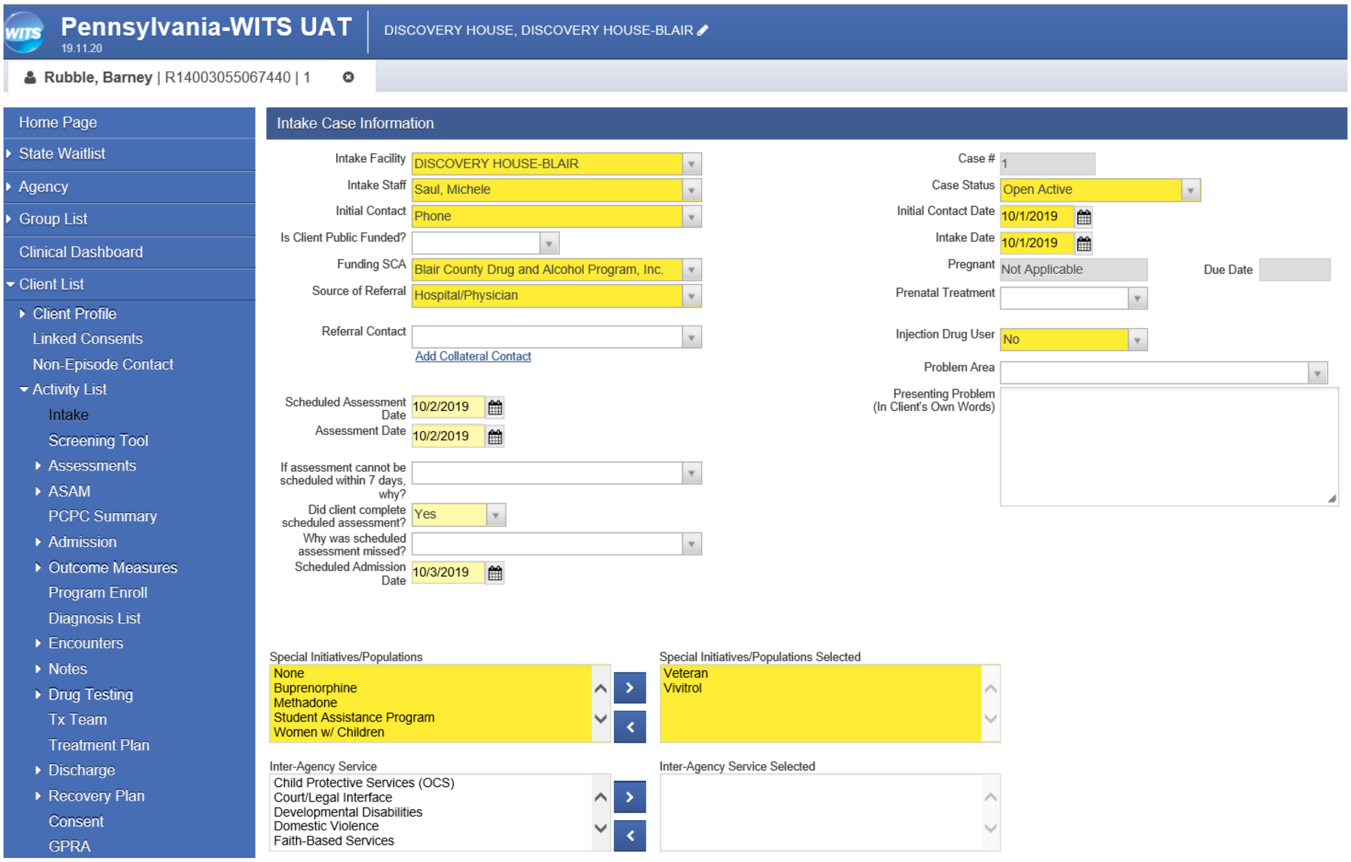


Figure 3-6: Intake Case Information screen

3. Click **Finish**.

Program Enroll

Where:* *Client List > Activity List > Program Enroll

Once an Intake has been created (see above section), complete the client's program enrollment.

1. On the left menu, click **Program Enroll**.
2. Click the **Add Enrollment** link.

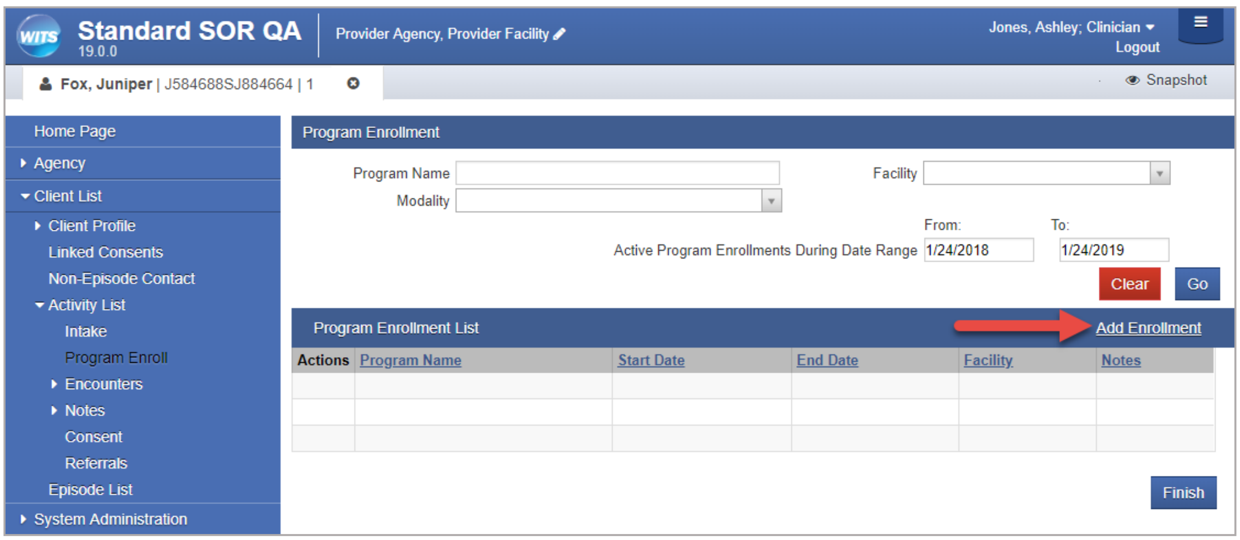


Figure 3-7: Program Enrollment screen

3. Complete fields on the Program Enrollment Profile.

Table 3-2: Program Enrollment Profile fields

Field	Description
Facility	Defaults to the current Facility name.
Program Name	Select the appropriate program for the client
Program Staff	Pre-populates with the current staff member name.
Start Date	Defaults to the current date.
Days on Wait List (TEDS Only)	Type the number of days.
Reason for waiting? (TEDS Only)	If the client had to wait longer than two weeks to access the recommended level of care, select the reason from the drop-down list. This field will be required if: • The program enrollment start date is more than 14 days from the most recent ASAM or Placement Summary date. • The LOC associated with the program is different than the Recommended LOC of the most recent ASAM or Placement Summary (consented or client activity).
Notes	Type any notes as needed.

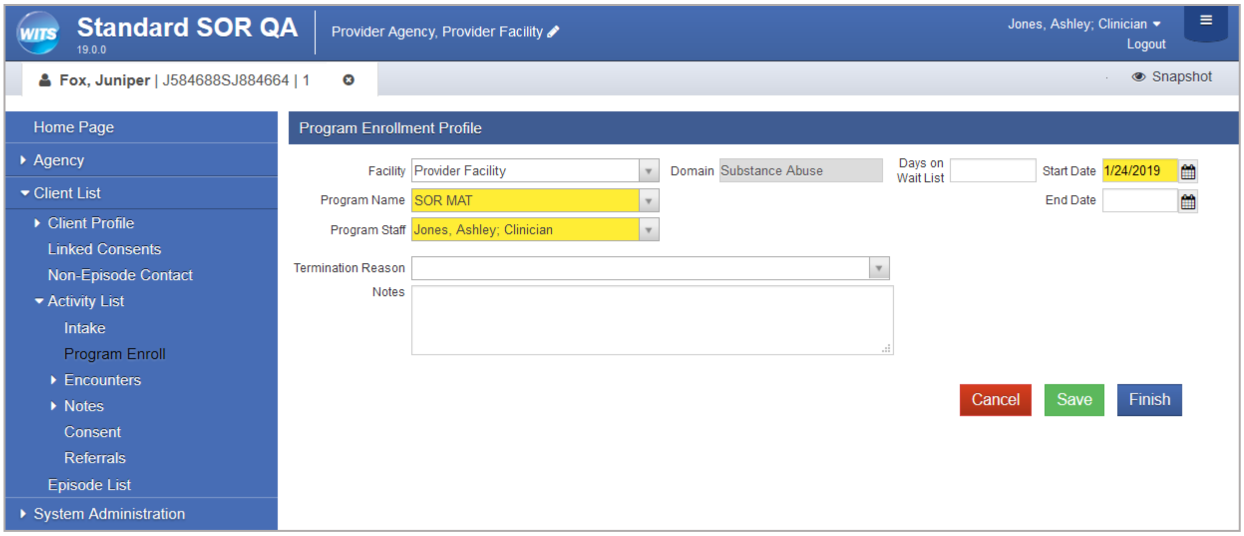


Figure 3-8: Program Enrollment Profile screen

4. Click **Finish**.

5. On the Program Enrollment screen, click **Finish**.

Part 4: GPRA Interviews

***Where:* Client List > Activity List > GPRA**

To access the GPRA section in WITS, select a client from the Client List and then view the client's Activity List. The GPRA section displays a list of previously entered GPRA interviews (at that agency) and includes link(s) to add a new interview record. For previously entered GPRA interviews, available actions include, View, Edit, and Delete, which are described below in *Table 4-1: Available Actions for GPRA Interviews*.

Important: The GPRA menu item will only appear if:

1. The staff member completing the GPRA interview has been assigned the following role, "GPRA (Full Access)". This role is assigned by your WITS or agency administrator.
2. The GPRA interview is being done for a client who is enrolled in a WITS program associated with the SOR grant. Your WITS administrator should advise you as to which of your agencies' programs are associated with the SOR grant.

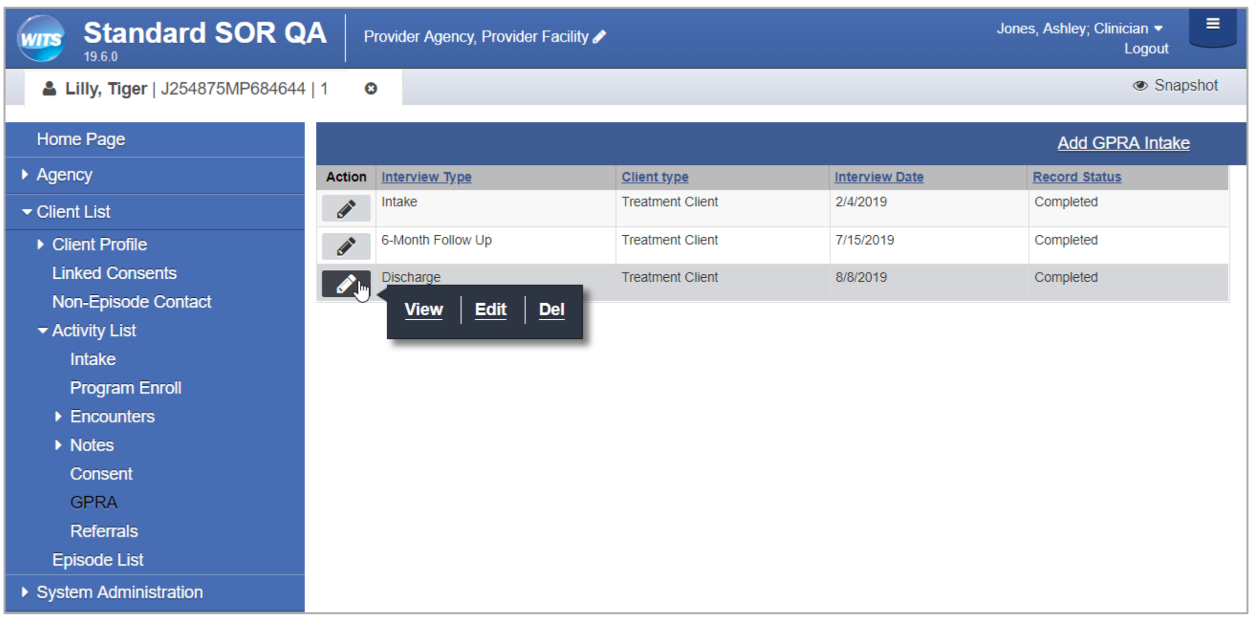


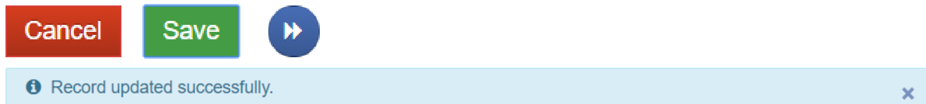
Figure 4-1: GPRA Menu displaying previously entered GPRA Interviews with Actions

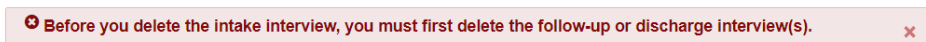
Tip: Depending on the existing interview record(s), the choice of adding a GPRA Follow up or a GPRA Discharge is available. The first GPRA Interview that can be added is the GPRA Intake.

Table 4-1: Available Actions for GPRA Interviews

Action	Description
View	Opens the interview in read-only mode.

<table>
<tr><th>Action</th><th>Description</th></tr>
<tr><td>Edit</td><td>Opens the interview in edit mode, where certain fields can be updated.

A Save button is available on screen, and when clicked, an information message will appear stating that the record has been successfully updated.
</td></tr>
<tr><td>Delete</td><td>A confirmation screen will appear, prompting the user to select ‘Yes’ or ‘No’ to continue with deleting the record.

If a client has follow-up or discharge interview(s), those interviews must be deleted before the intake interview can be deleted.
</td></tr>
</table>

Completing Interviews

Action Buttons

GPRA Interviews must be completed in one session and all questions must be answered to save the record. Clicking **Cancel** will cancel adding the GPRA interview. Users progress through the interview by completing the required fields on screen and then clicking the **right-arrow** button to move to the next set of questions. Each field must be completed before moving to the next screen.

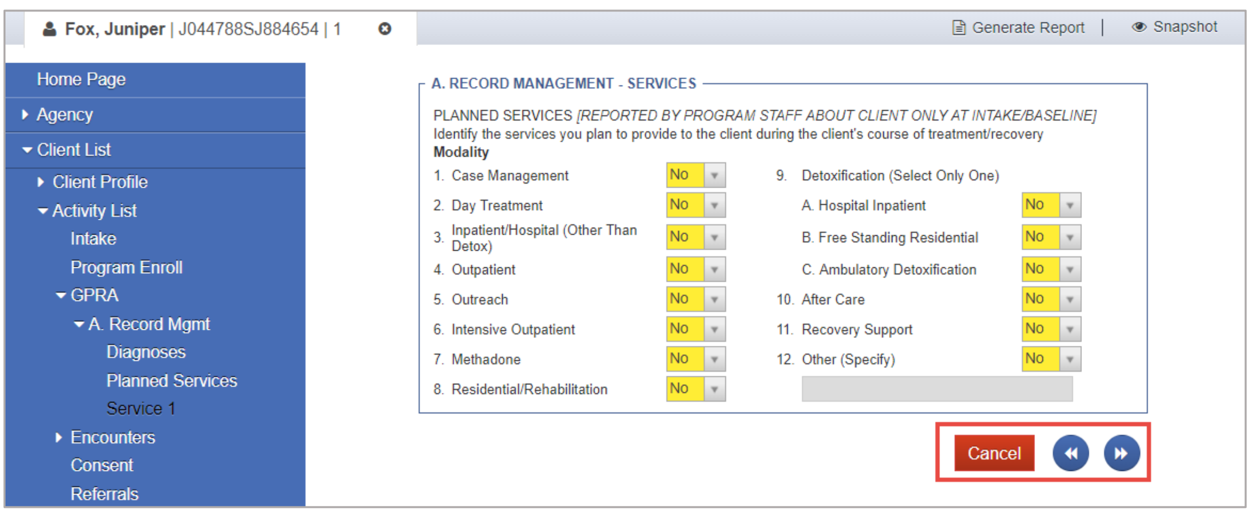


Figure 4-2: GPRA Interview Left and Right-arrow Buttons

Users can choose to go back to a prior screen by clicking the **left-arrow** button, however, answers to the current screen will be lost (a confirmation screen will appear, prompting users to select 'Yes' or 'No' before proceeding).

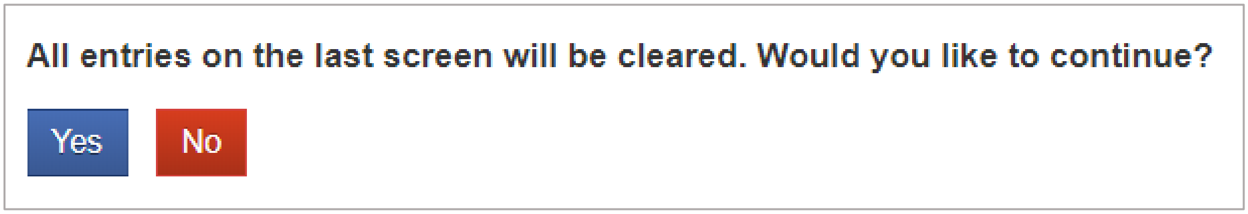


Figure 4-3: GPRA Confirmation message displayed when left-button is clicked

Automation (Skip Logic)

Based on the client's response to certain questions, the screen will update causing some questions to become required and/or automatically filled in as read-only fields. For example, if the client has not served in the military (answered "No" to Section A Question 5), the system will automatically fill in the other military questions with "Not Applicable".

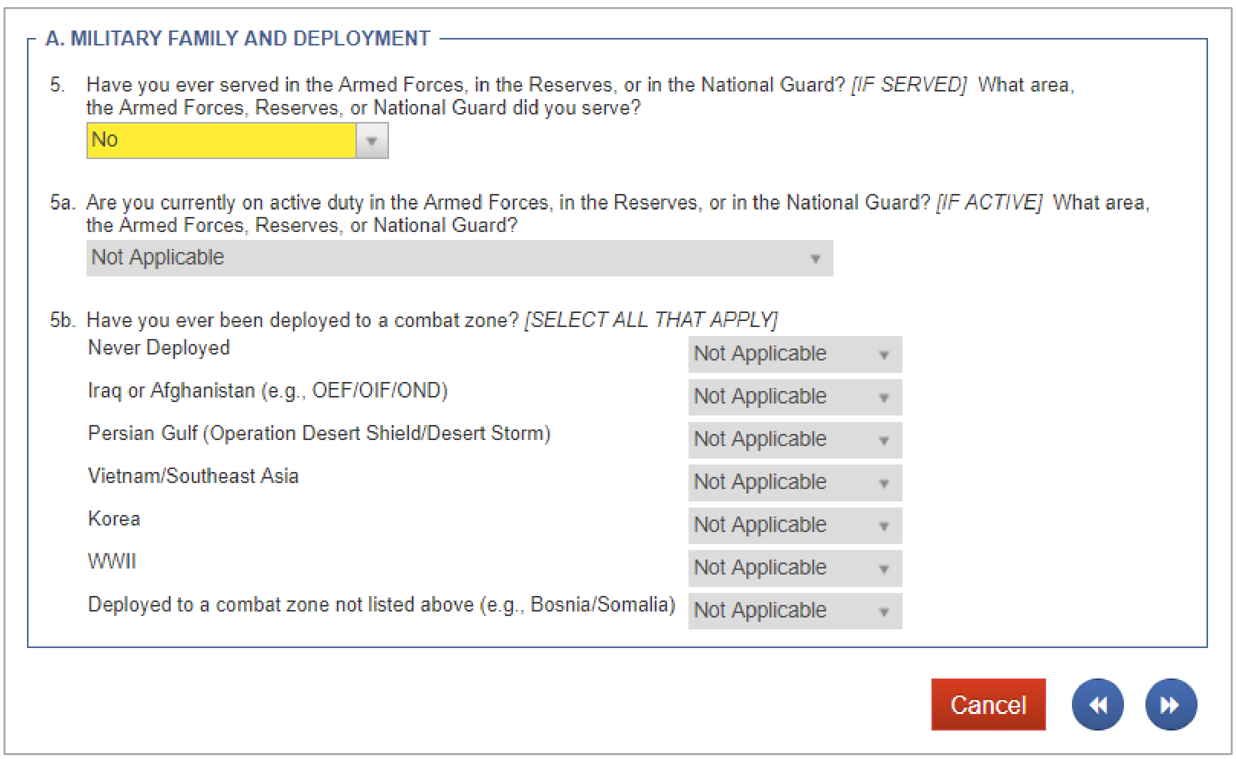


Figure 4-4: GPRA Interview, Automation (skip logic) example

Answers Reviewed

Answers to some questions are also checked with responses given in subsequent sections. For example, the value in field B.1.d (used both alcohol and drugs (on the same day)) should not exceed value in B.1.c (used illegal drugs).

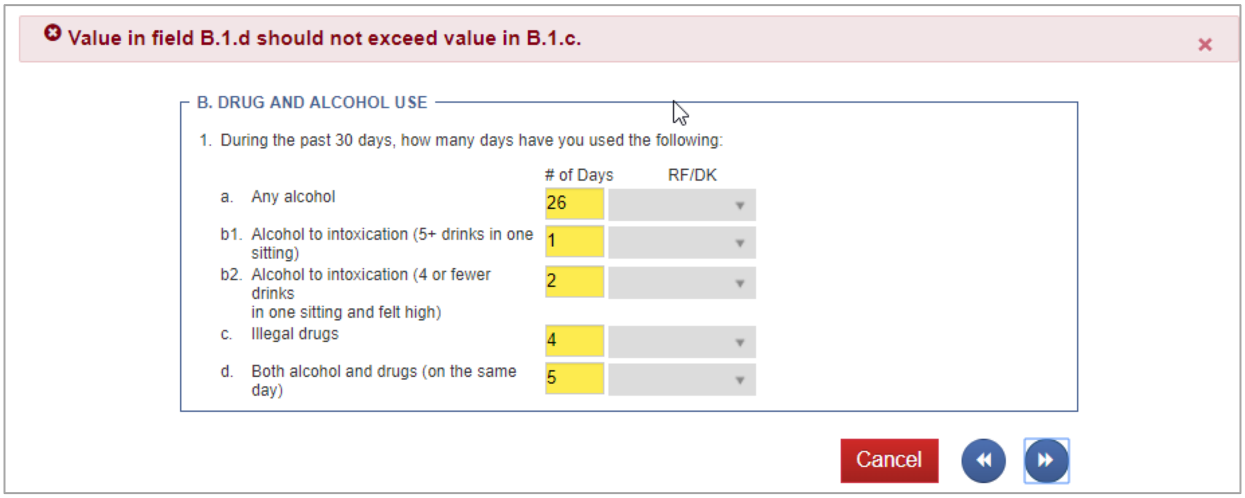


Figure 4-5: Reviewed Answers Example (Section B.), Number of days used alcohol and drugs

You reported that you have used illegal drugs during the past 30 days (B.1.c), then E4 (how many times have you committed a crime) should be no less than B.1.c, since taking illegal drugs is a crime. Do you wish to continue?

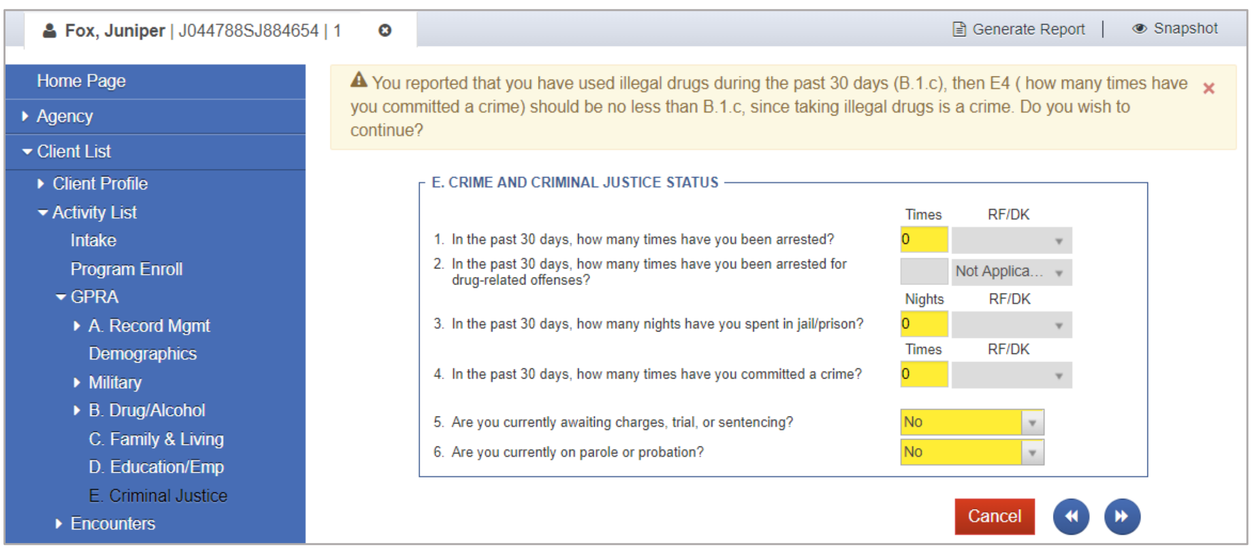


Figure 4-6: Reviewed Answers Example (Section E.), Used illegal drugs

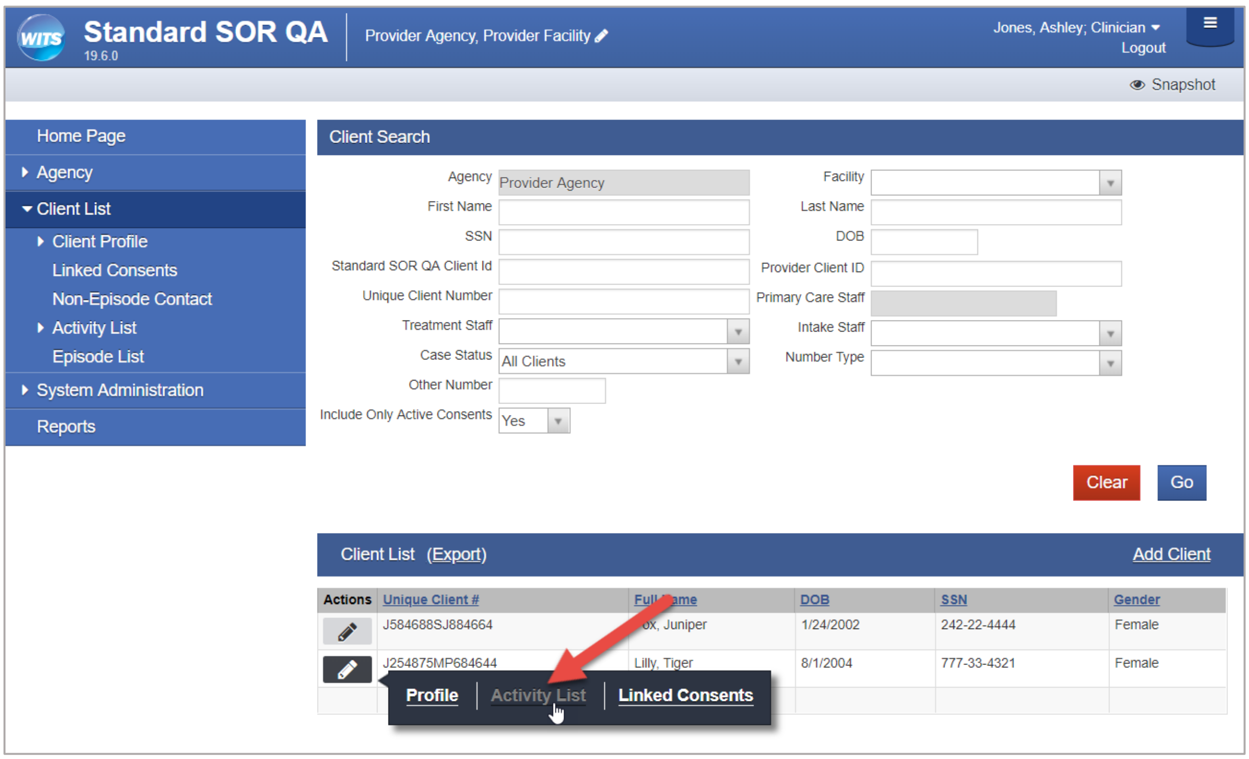
Entry for Question B.3 should be 'YES' if the Route for any substance is 'Non-IV Injection' or 'IV'.

GPRA Intake Interview

***Where:* Client List > Activity List > GPRA > GPRA Intake**

Follow the steps below to add a GPRA Intake Interview.

1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.



2. On the left menu, click **GPRA**.
3. On the GPRA List screen, click **Add GPRA Intake**.

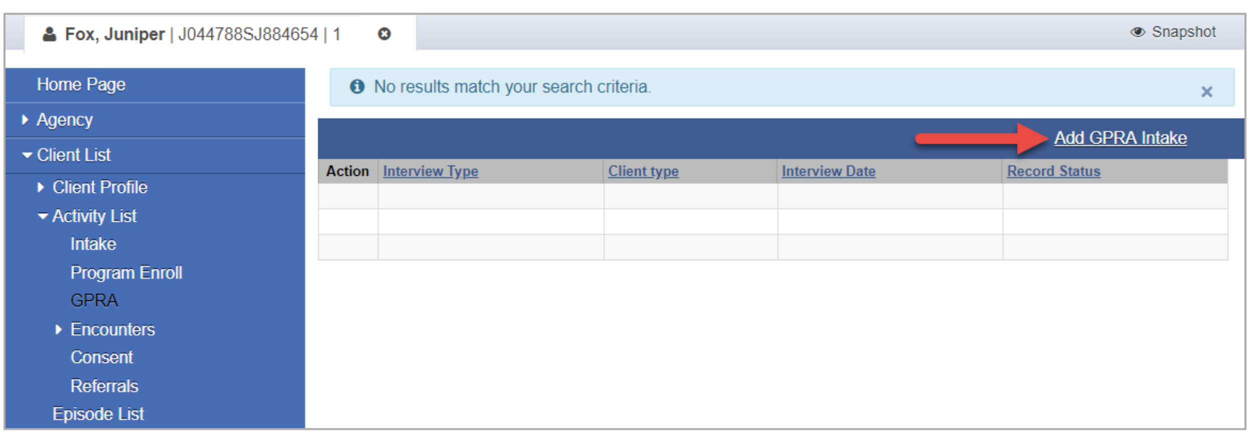


Figure 4-7: Add GPRA Intake

4. The system will display the first of several GPRA Interview screen. Complete the required fields.

Note: The 'Interview Date' must be greater than or equal to client intake date.

The 'Interview Date' must occur during the active period of the selected Program Enrollment (MM/DD/YYY -).

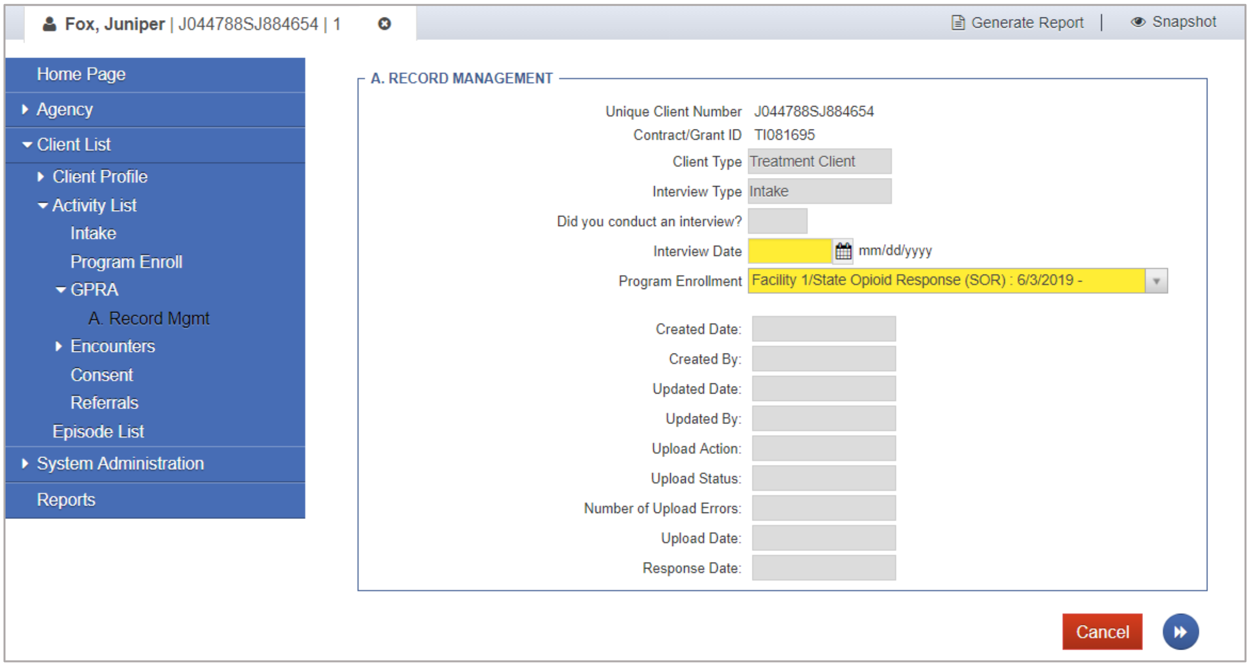


Figure 4-8: GPRA Intake, Record Management section

5. Click the **right-arrow** to move to the next GPRA section.
6. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.

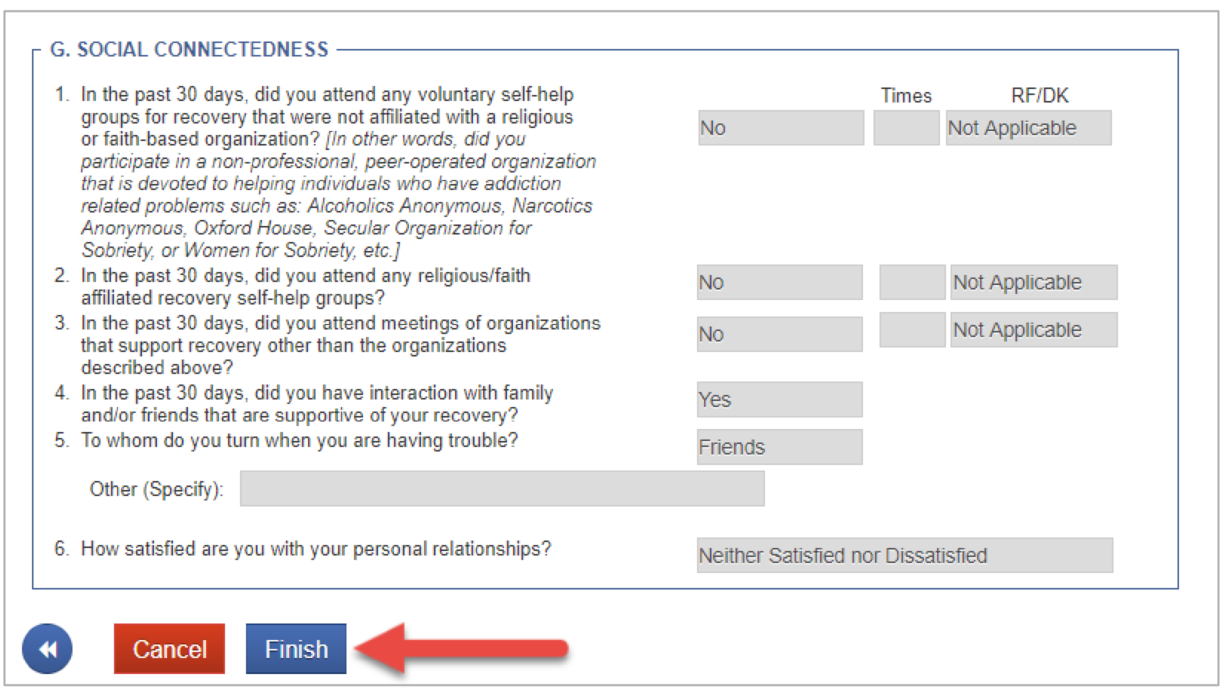


Figure 4-9: Intake Interview, Summary Screen

GPRA Interview Compliance Details

Grant Requirement

A GPRA Follow-up Interview must be completed with the client 6 months after the GPRA Intake Interview. There is a 3-month window to enter that follow-up interview in WITS and be in compliance with the grant program's requirement. The compliance window opens 5 months after the GPRA Intake Interview and ends 8 months after the GPRA Intake Interview.

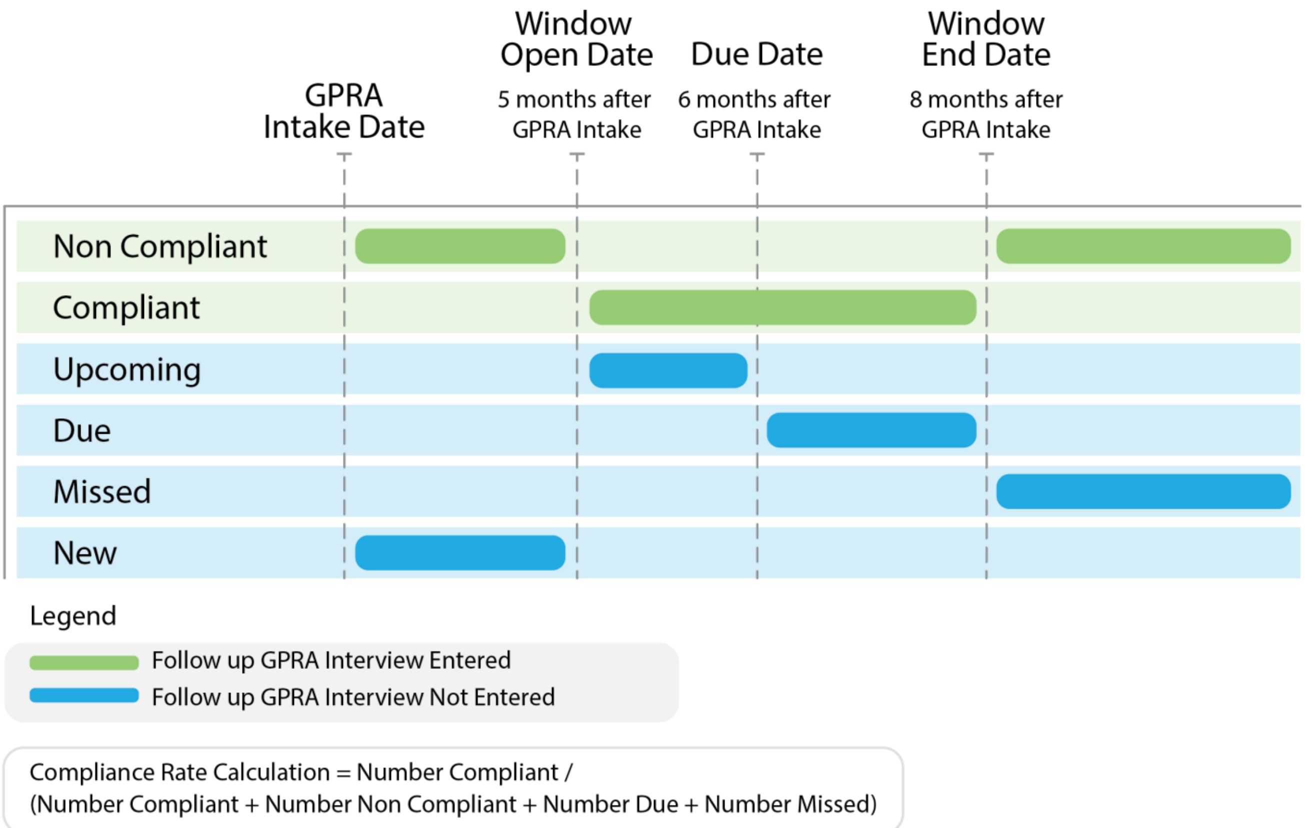


Figure 4-10: GPRA Follow-up Due Diagram

Definitions for each follow-up status are included in the following table.

Table 4-2: Follow up Attendance Definitions

Term	Meaning
Compliant	GPRA Follow-up Interviews **entered** into WITS **during** the compliance window specified above are considered compliant. The GPRA follow up interview must be conducted (Was the GPRA interview conducted = Yes) and the interview date must be within the window.
Non-Compliant	GPRA Follow-up Interviews **entered** into WITS **outside** of the compliance window specified above are considered non-compliant. This count also includes GPRA Follow-up Interviews that are entered in the system but were not conducted (with no interview date, Was the GPRA interview conducted = No).
Upcoming	Clients with no follow-up interview who have a GPRA intake Interview dated between 5 and 6 months ago (for 6-month follow up) are part of the **Upcoming** count.

Term	Meaning
Due	Corresponds to the number of clients who have reached the due date (6 months) and do not yet have a GPRA Follow-up Interview record in WITS. This count does not consider the clients who have a corresponding GPRA Discharge Interview with a termination of "Death, Unknown" and "Death, Cause known". This would cover a scenario where a client died before the follow-up became due.
Missed	The clients who do not have a GPRA Follow-up Interview entered into WITS after the end of the window are a part of the **Missed** count.
New	The Clients who have a GPRA intake Interview, no GPRA Follow-up Interview, and who have not entered in a follow up window yet, are a part of the **New** count.

GPRA Follow-up Due Summary Screen

Where: Agency > GPRA Follow-up Due Summary

The **GPRA Follow-up Due Summary** screen displays a summary view of where an agency stands with their follow up interviews and includes the agency's compliance rate. Users can select from the available search fields and click **Go** to view the search results. Information on these search fields are listed in the table below.

The search results will display a distinct count of GPRA interviews for each follow-up status available at the time of searching. For definitions of each status, see *Table 4-2: Follow up Attendance Definitions* on page 33 above.

Table 4-3: GPRA Follow-up Due Summary Screen Search Filters

Field	Description
Agency Type	In the **Agency Type** search field, the option "**Intake**" represents the agency where the GPRA Intake Interview was conducted. The option, "**Follow-up**" represents any agency where the GPRA follow-up interview can be conducted.
Grant	This required field will be prepopulated with the SOR grant.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the agencies. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the facility names. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.

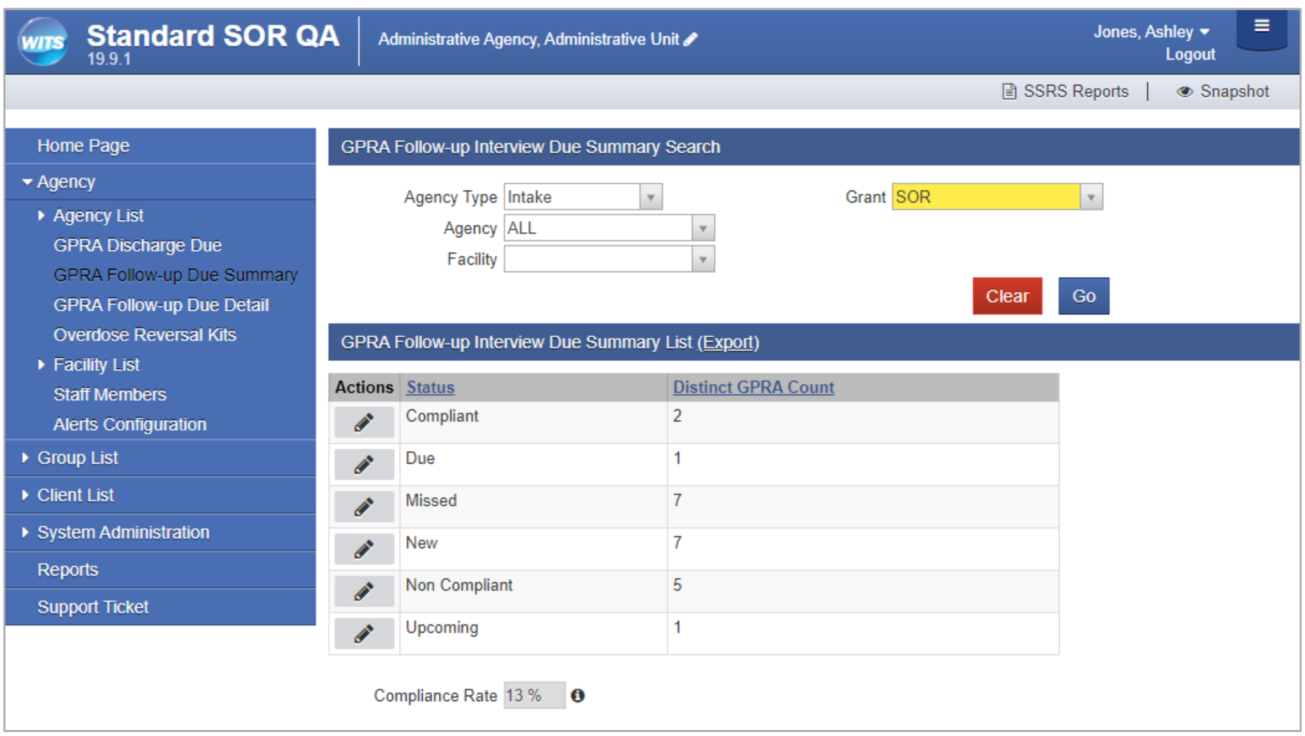


Figure 4-11: GPRA Follow-up Due Summary screen

Detailed information for each interview status can be seen by hovering over the pencil icon in the Actions column, then clicking **Details**. The system will then redirect to the GPRA Follow-up Due Detail screen, displaying the associated client records for the selected interview status and the current search criteria. The GPRA Follow-up Due Detail screen is covered in the next section.

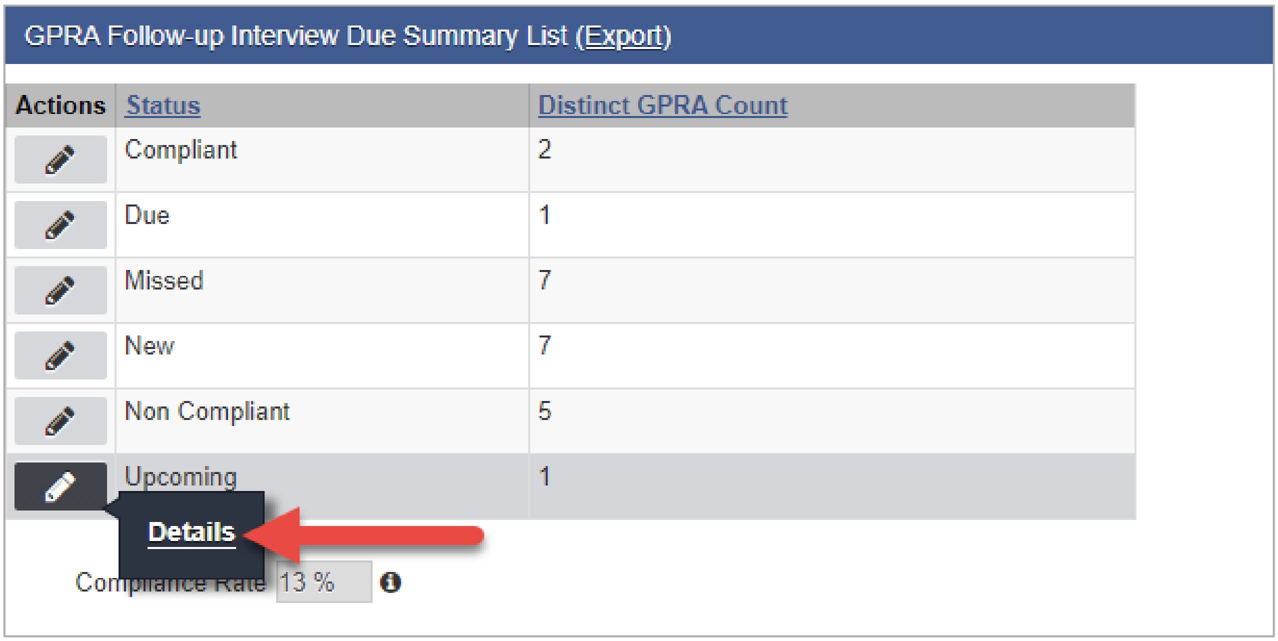


Figure 4-12: GPRA Follow-up Interview Status List, Details link

GPRA Follow-up Due Detail Screen

Where:* *Agency* > *GPRA Follow-up Due Detail

The **GPRA Follow-up Due Detail** screen displays a list of client records with information regarding the clients' GPRA interview status. Staff members can use the available search fields and click **Go** to view the results.

Table 4-4: GPRA Follow-up Due Detail Screen Search Filters

Field	Description
Agency Type	In the **Agency Type** search field, the option "**Intake**" represents the agency where the GPRA Intake Interview was conducted. The option, "**Follow-up**" represents any agency where the GPRA follow-up interview can be conducted.
Grant	This required field will be prepopulated with the SOR grant.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the agencies. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the facility names. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.
Status	The **Status** search field will filter the list of clients corresponding to a specific compliance status. For definitions of each status, see *Table 4-2: Follow up Attendance Definitions* on page 33 above.

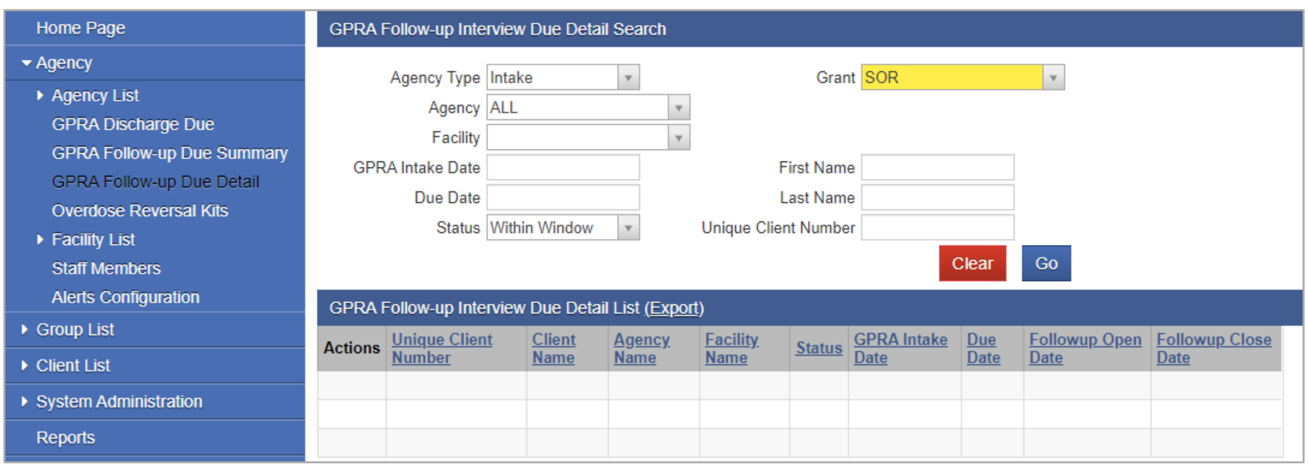
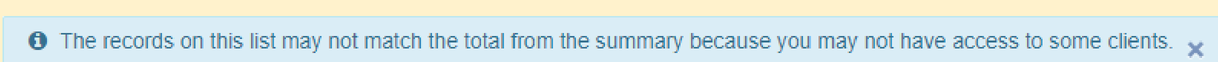


Figure 4-13: GPRA Follow-up Due Detail screen

If the staff member was redirected to this screen by clicking the "**Details**" link on the GPRA Follow-up Due Summary screen, the Agency Type, Agency, Facility and Grant, search fields and Status will be prepopulated with the options entered on the Summary screen. The following informational message will also be displayed, *"The records on this list may not match the total from the summary because you may not have access to some clients."*

Note: Since the GPRA Follow-up Due Detail screen includes client names, the search results displayed in the list are filtered to only include clients that the staff member has access to.



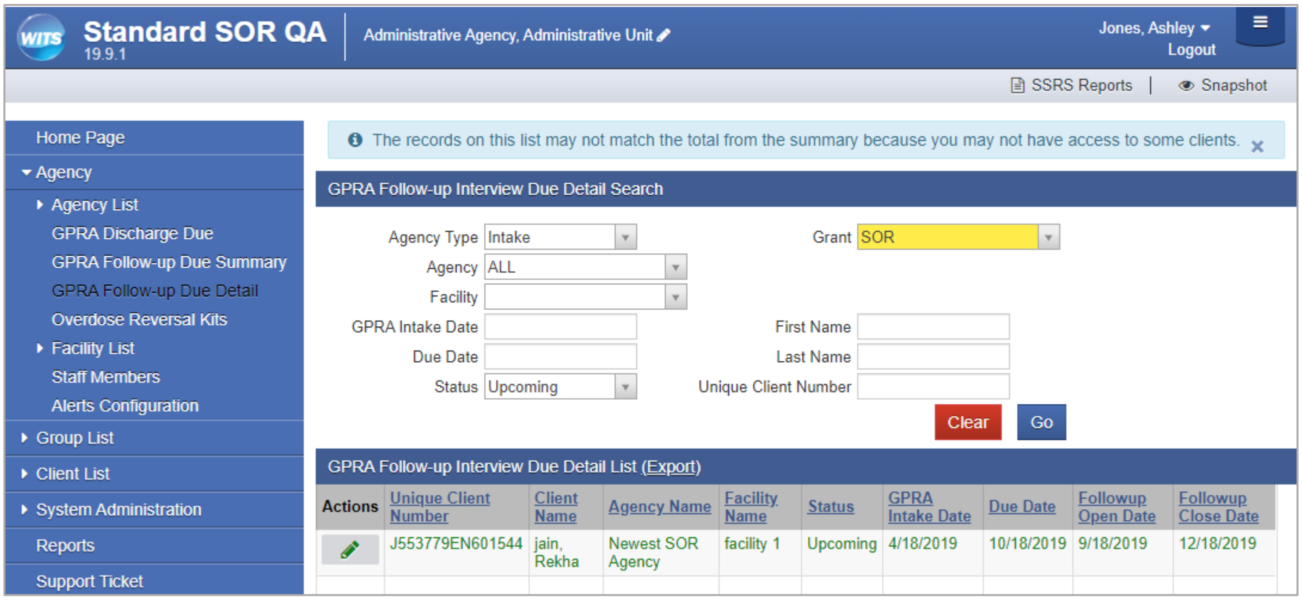


Figure 4-14: GPRA Follow-up Due Screen, pre-populated based on Summary screen selections

In the **Actions** column, clicking the "**View**" link will redirect to the client's GPRA list screen if the staff member is currently in the same context agency as the client. If the staff members' context agency is different than the client, clicking the "View" link will display the following error message, *"This client does not exist in the context agency. Please change your context agency to view the client."*

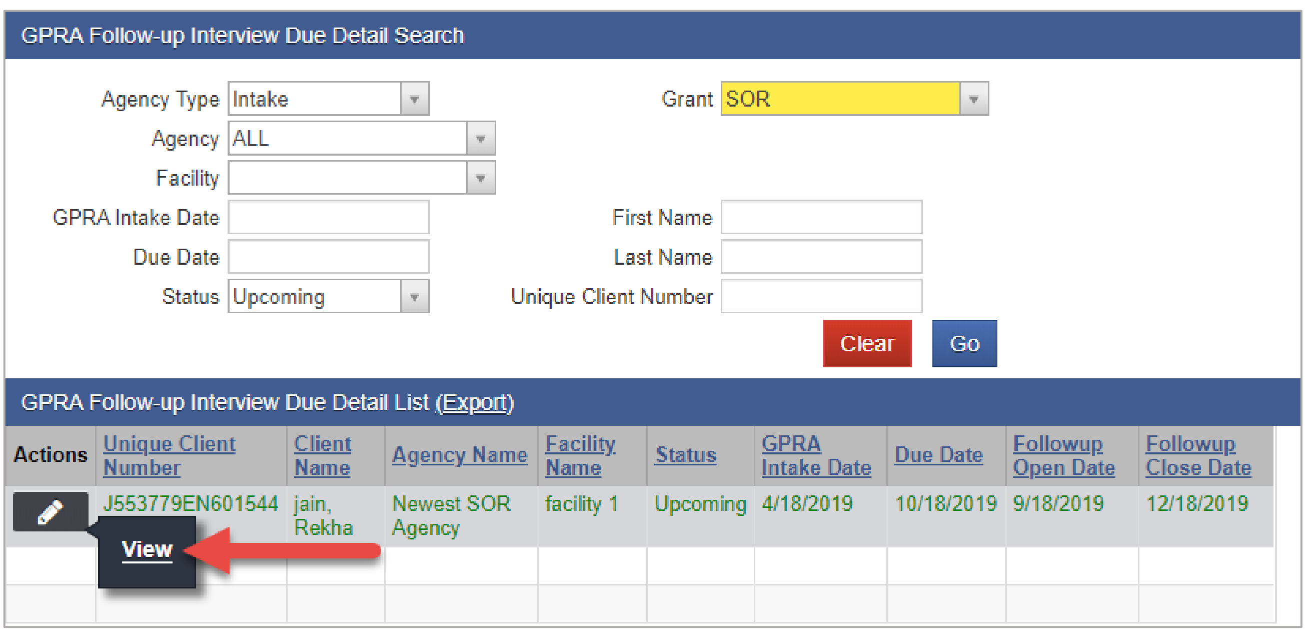


Figure 4-15: GPRA Follow-up Due Detail, View link

Note: If you have access to multiple agencies, make sure you're in the correct context agency to view the client record. Otherwise, the following error message will be displayed.

"This client does not exist in the context agency. Please change your context agency to view the client."

This client does not exist in the context agency. Please change your context agency to view the client.

GPRA Follow-up Interview

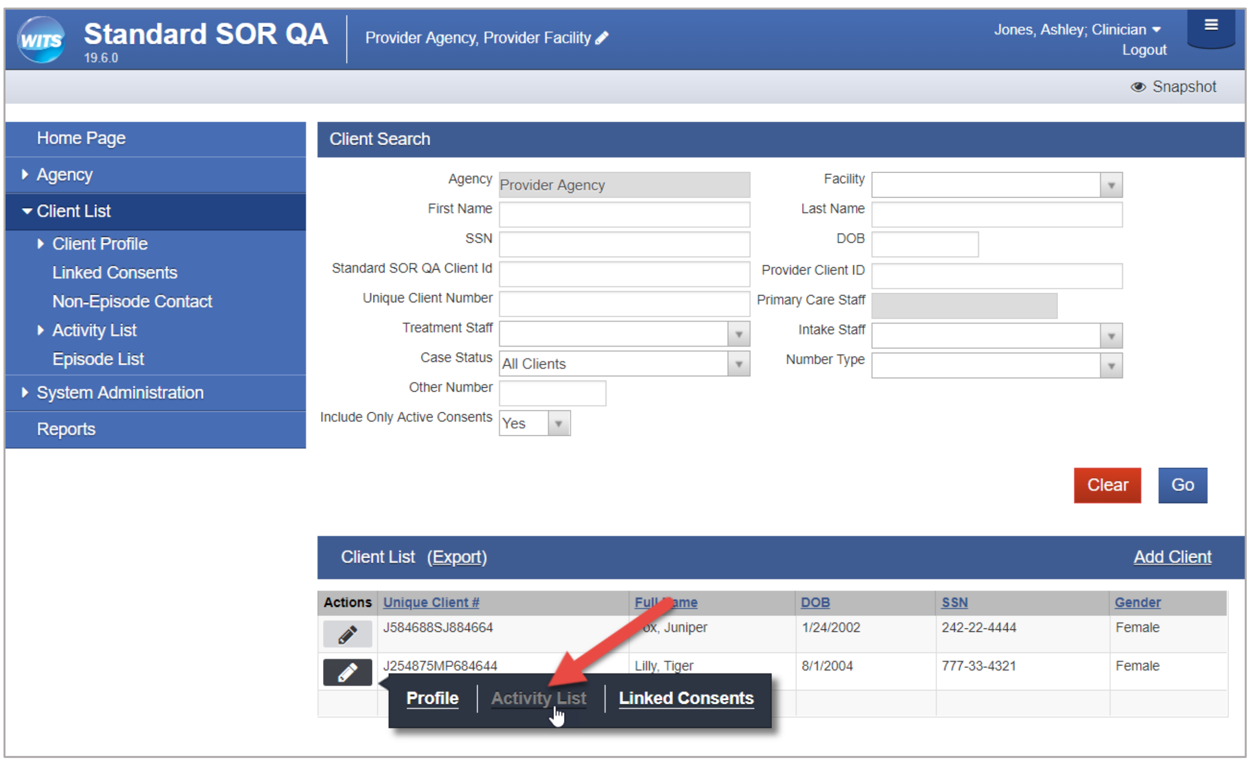
***Where:* Client List > Activity List > GPRA > GPRA Follow-up**

GPRA Follow-up Interviews should be added 5 to 8 months after a client's GPRA Intake Interview Date. Follow-up GPRA Interviews include additional questions to record the follow-up status. To add a follow-up record, follow the steps below.

Note: If a follow-up interview has been conducted, **sections B through G** and **I** must be completed.

If the follow-up interview has ***not*** been conducted, **section I** must be completed.

1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.



2. On the left menu, click **GPRA**.

3. On the GPRA List screen click **Add GPRA Follow-up**.

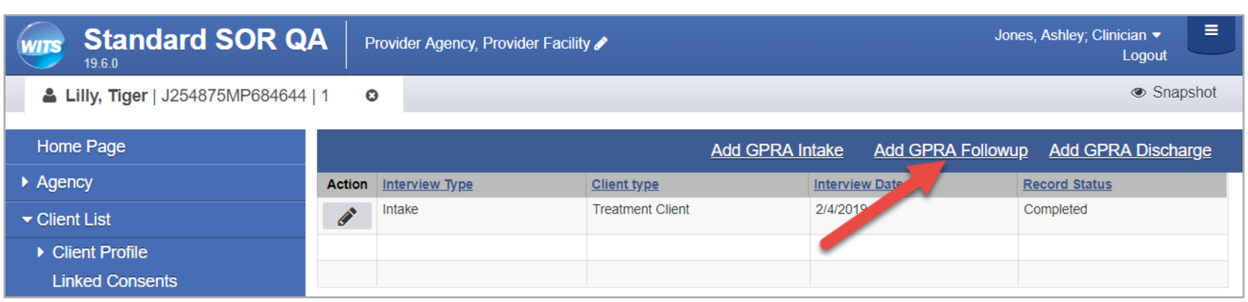


Figure 4-16: GPRA list, Add GPRA Follow-up link

4. The system will display a confirmation screen stating, “You are about to enter a 6-month follow-up record for this client. Would you like to continue?” Select **Yes** to start the follow-up interview.

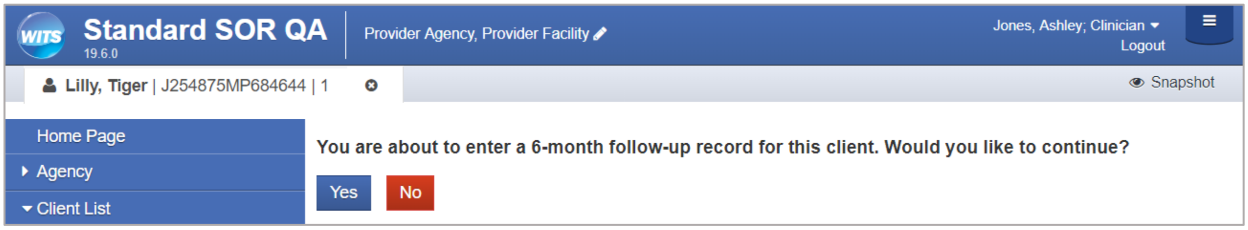
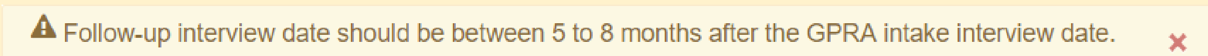


Figure 4-17: Follow-up interview confirmation screen

Note: The system will display a warning message if the Follow-up Interview Date is not within 5 to 8 months after the GPRA Intake Interview Date. This message will also be displayed on the GPRA list screen.



5. When the interview opens, complete the required fields and click the **right-arrow** button to progress to the next screen. If the interview was not conducted (answered “No” to the question “Did you conduct an interview?”), clicking the right-arrow button will display Section I. Follow-up Status.

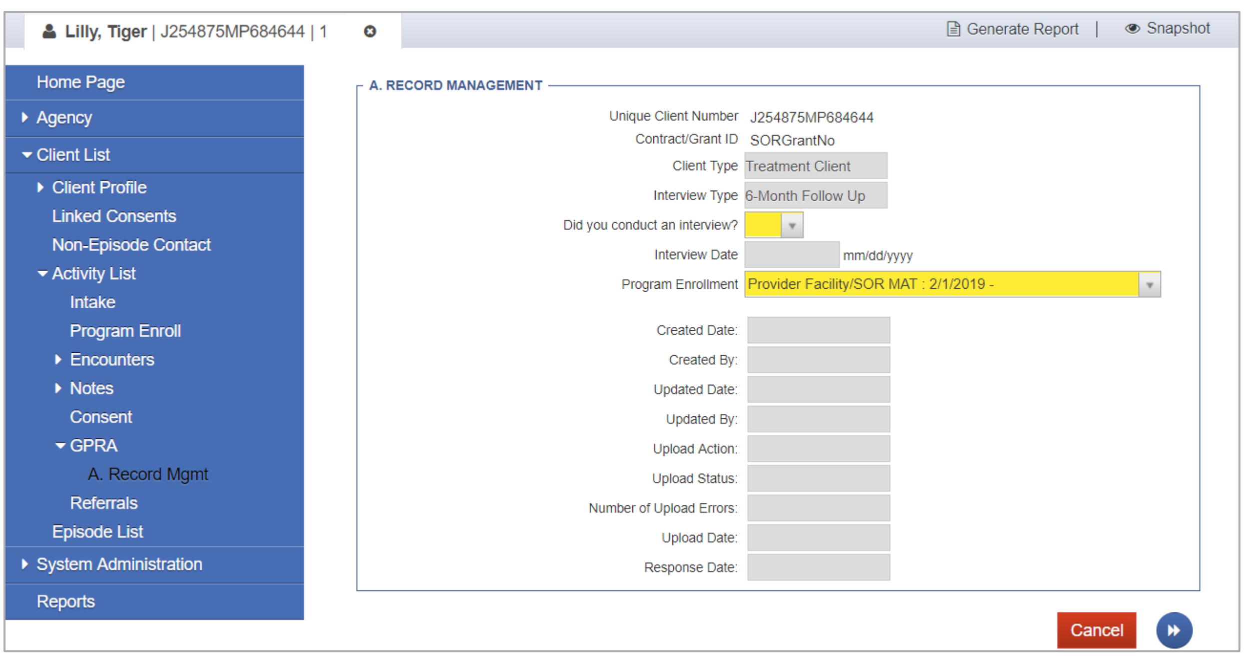


Figure 4-18: GPRA Follow-up, Section A. Record Management

6. In **Section A. Record Management - Behavioral Health Diagnoses**, if the client had medications selected on their encounter(s) within the grant episode, and the user answers "**Yes**" to questions 1a or 2a, then medication information will be prepopulated on screen. Users can modify this prepopulated information as needed.

> **Note**: Encounters may have been entered in other agencies than yours.

The Received field will be set to "Yes" for each medication listed on the encounter(s), and "No" to all other medications. For each drug received, the number of days will be set based on the encounter(s) of the client's grant episode, and when the encounter service start date or end date were 30 days or less from the GPRA interview date. If more than one drug was selected on an encounter, then the same number of days for each drug on the GPRA discharge and Follow ups will be set. The number of days is based on encounter service start date/end date. If the encounter has no end date, it will be counted as one day. If multiple encounters are entered on the same day, then it counts 1 day per medication.

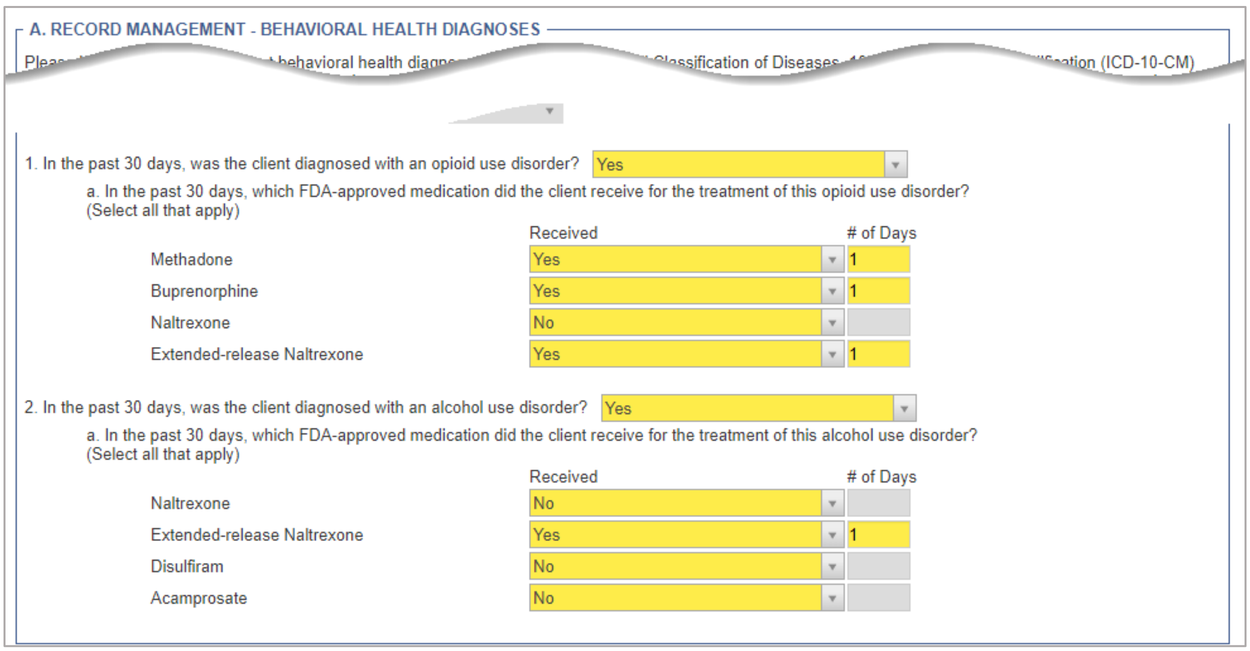
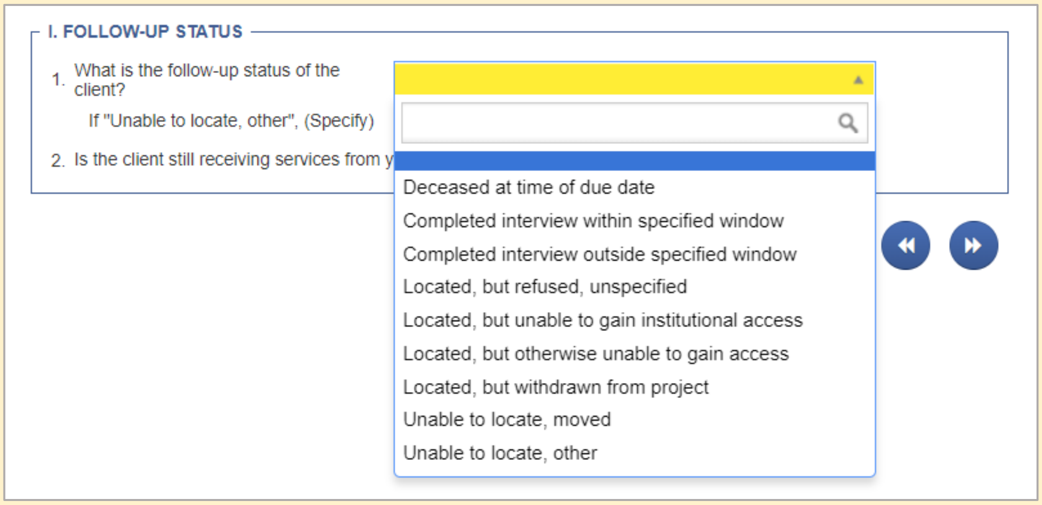
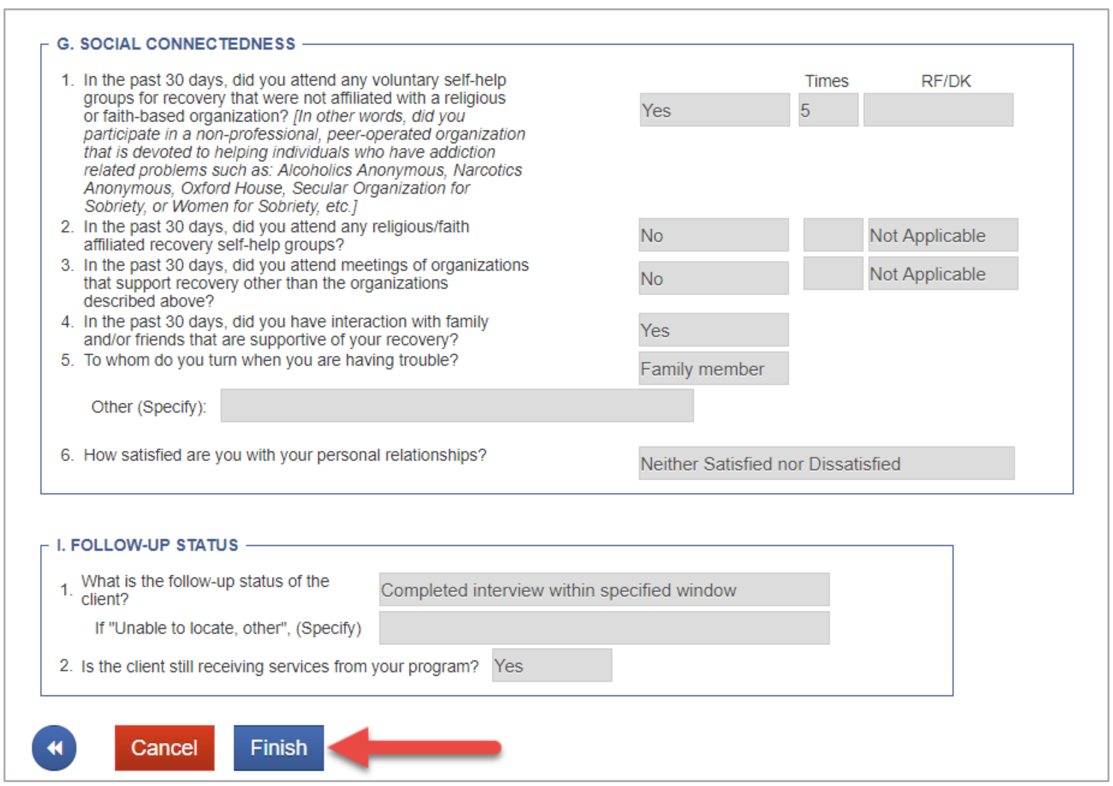


Figure 4-19: GPRA Follow-up Interview, Section A, questions 1a and 2a, prepopulated values

Note: For question I.1., make sure to select the correct follow-up status for the client from the drop-down list, especially when selecting if the interview was completed ***within*** specified window, or ***outside*** specified window.



7. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.



8. If the GPRA Follow up interview was conducted within the 5 to 8 months window, and if no GPRA Discharge exists for this client's grant episode, then the system will display a confirmation screen asking if you would like to create a GPRA Discharge interview with the same information as the GPRA Follow up interview:

Select **Yes** and the GPRA Discharge will automatically be created. It is recommended that you review the newly created GPRA Discharge interview and make any updates as necessary. For example, **section J – Discharge Status** may need questions 3. and 4. updated from “No” to “Yes”, if it applies.

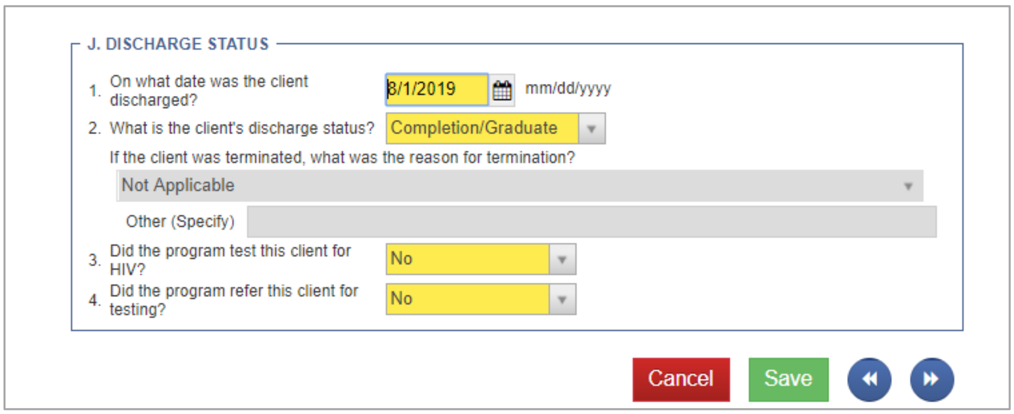


Figure 4-20: Discharge Status

GPRA Discharge Due Screen

Where: Agency > GPRA Discharge Due

The **GPRA Discharge Due** screen displays at the Agency level, clients with a GPRA Intake interview date 30 days ago and the client has no encounter, or their most recent encounter is 30 days ago. Users can select from the available search fields and click **Go** to view the search results. In the **Actions** column, clicking the "**View Client**" link will redirect to the client's GPRA list screen if the staff member is currently in the same context agency as the client.

Table 4-5: GPRA Discharge Due Screen Search Filters

Field	Description
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has **All Agency Access** roles, then this field will display all the agencies.
Grant	This field will be prepopulated with the SOR grant.

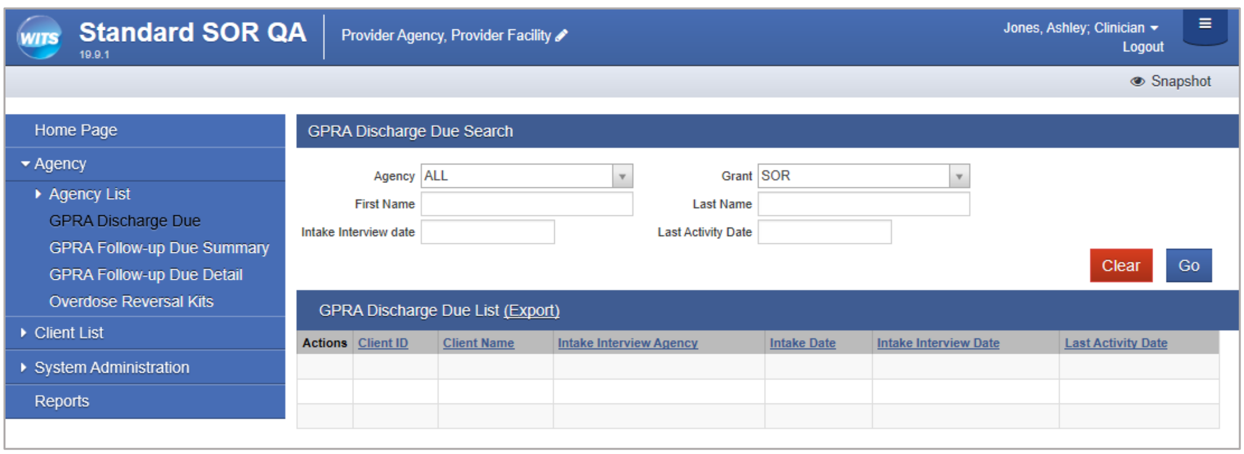


Figure 4-21: GPRA Discharge Due Screen

Note: Since the GPRA Discharge Due screen includes client names, the search results displayed in the list are filtered to only include clients that the staff member has access to.

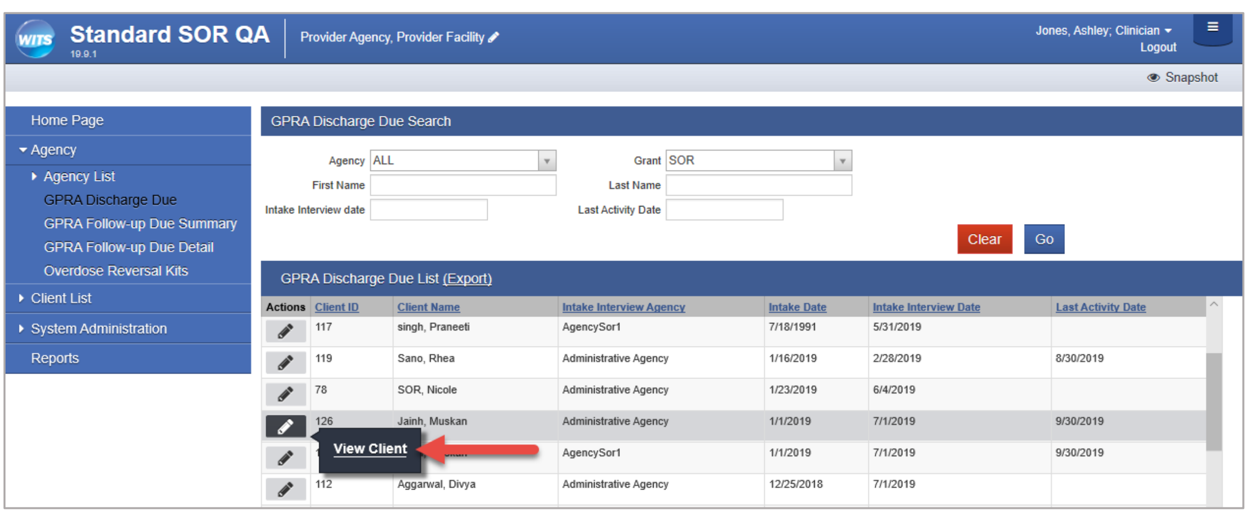


Figure 4-22: GPRA Discharge Due screen, View Client link

GPRA Discharge Interview

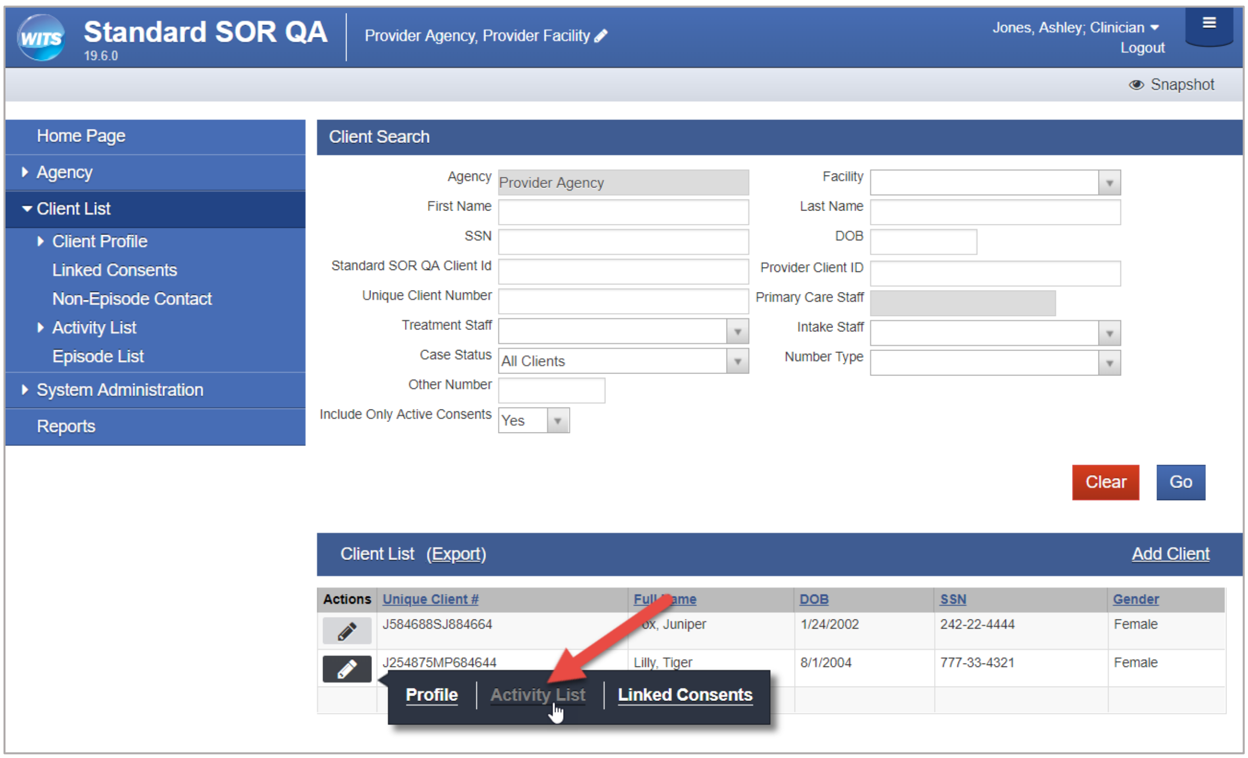
***Where:* Client List > Activity List > GPRA > GPRA Discharge**

To add a discharge record, follow the steps below.

Note: If a Discharge interview has been conducted, **Sections B through G**, **J** and **K** must be completed.

If the Discharge interview ***has not*** been conducted, **Sections J** and **K** must be completed.

1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.



2. On the left menu, click **GPRA**.
3. On the GPRA List screen, click **Add GPRA Discharge**.

Figure 4-23: GPRA List screen, Add GPRA Discharge link

4. The system will display the following message, "You are about to enter a discharge record for this client. Would you like to continue?" Select **Yes** to start the discharge interview.

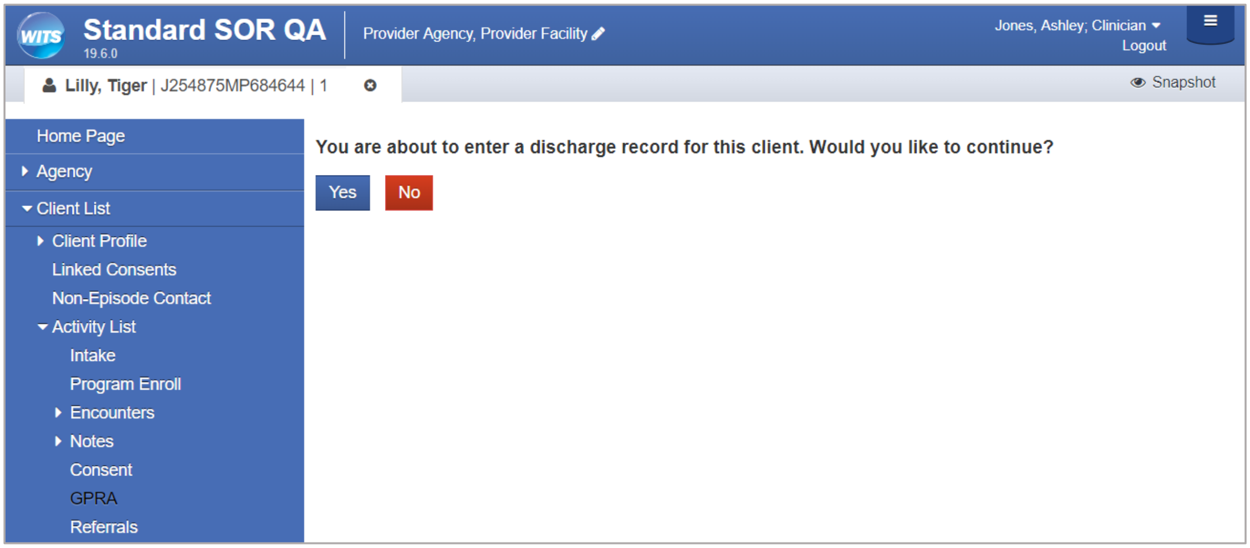


Figure 4-24: Discharge interview confirmation screen

5. When the interview opens, complete the required fields and click the **right-arrow** button to progress to the next screen. If the interview was not conducted (answered "No" to the question "Did you conduct an interview?"), clicking the right-arrow button will display Section J. Discharge Status.

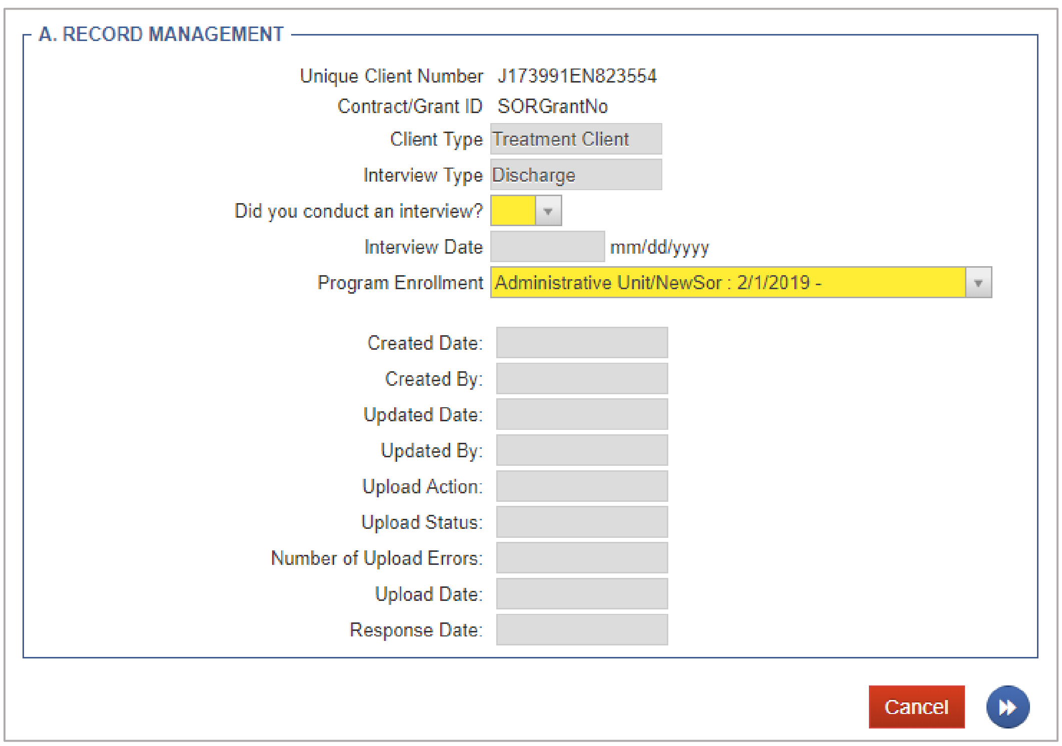


Figure 4-25: GPRA Discharge Interview; Section A. Record Management

6. In **Section A. Record Management - Behavioral Health Diagnoses**, if the client had medications selected on their encounter(s), and the user answers "**Yes**" to questions 1a or 2a, medication information will be prepopulated on screen. Users can modify this prepopulated information as needed.

Note: Encounters may have been entered in other agencies than yours.

The Received field will be set to "Yes" for each medication listed on the encounter(s), and "No" to all other medications. For each drug received, the number of days will be set based on the encounter(s) of the client's grant episode, and when the encounter service start date or end date were 30 days or less from the GPRA interview date. If more than one drug was selected on an encounter, then the same number of days for each drug is set on the GPRA discharge and Follow ups. The number of days is based on encounter service start date/end date. If the encounter has no end date, it will be counted as one day. If multiple encounters are entered on the same day, 1 day per medication is counted.

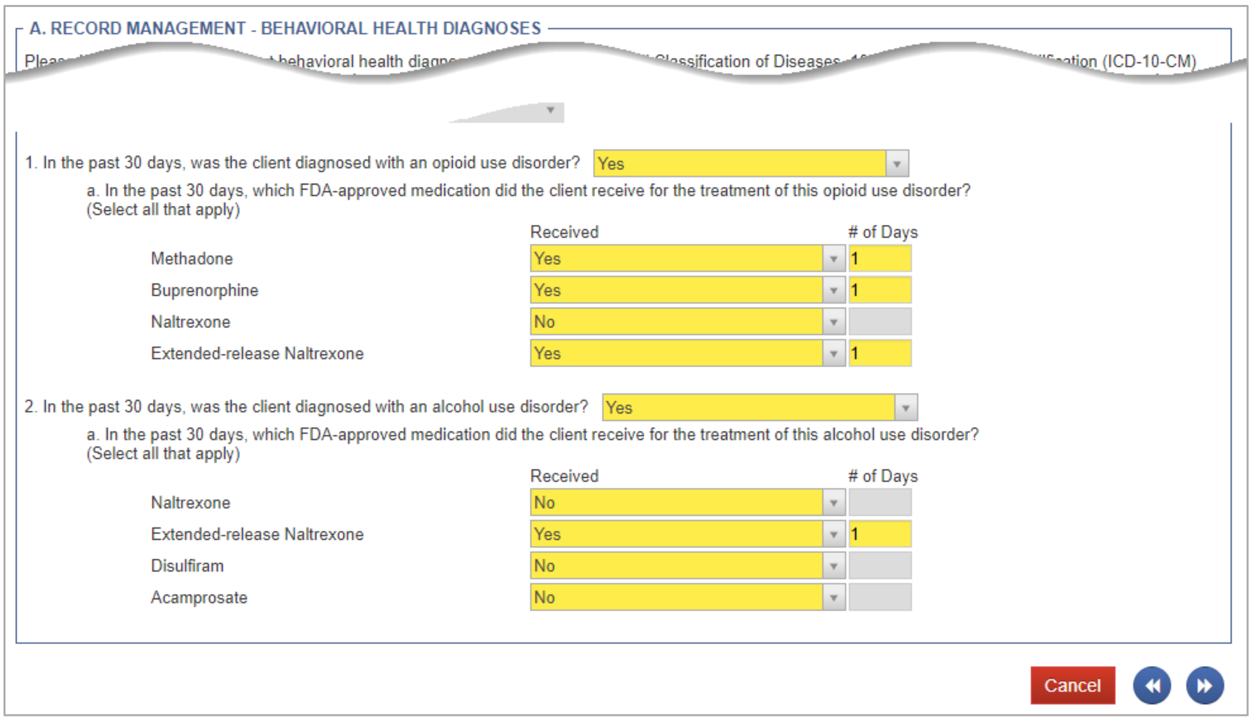


Figure 4-26: GPRA Discharge Interview, Section A, questions 1a and 2a, prepopulated values

7. Complete the required fields and click the **right-arrow** button to progress to the next screen.

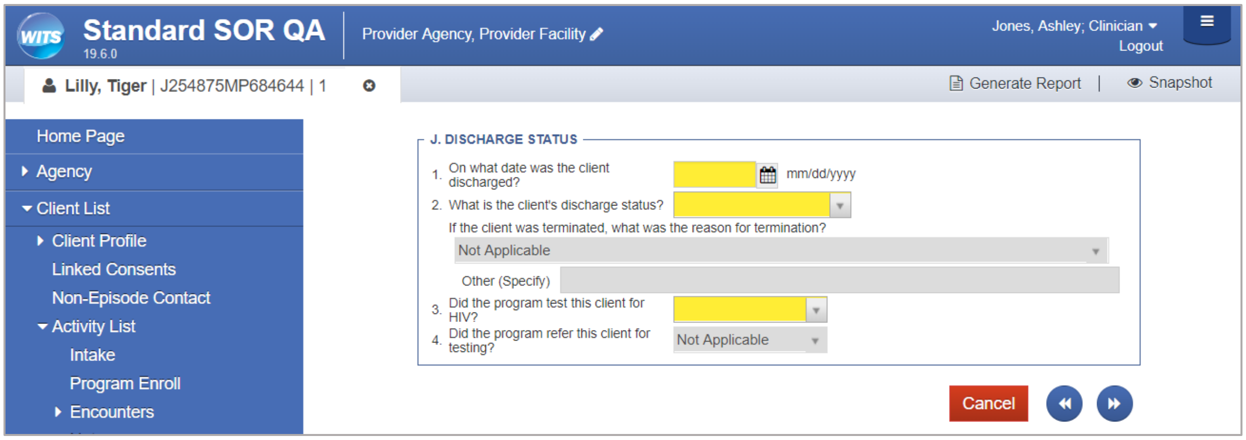


Figure 4-27: Section J. Discharge Status

8. **Section K – Services Received** will be prepopulated based on the encounter(s) recorded for the client within the grant episode (encounters may have been entered in other agencies than yours). You may edit this section as needed.

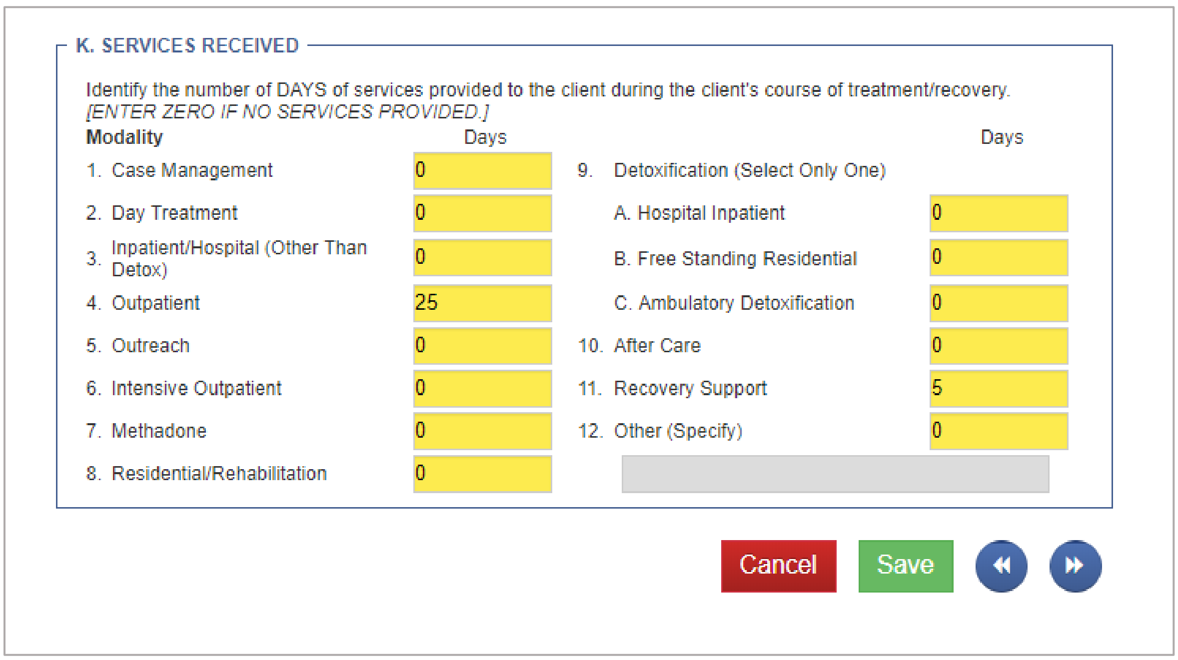


Figure 4-28: Section K. Services Received; Number of Days of Services

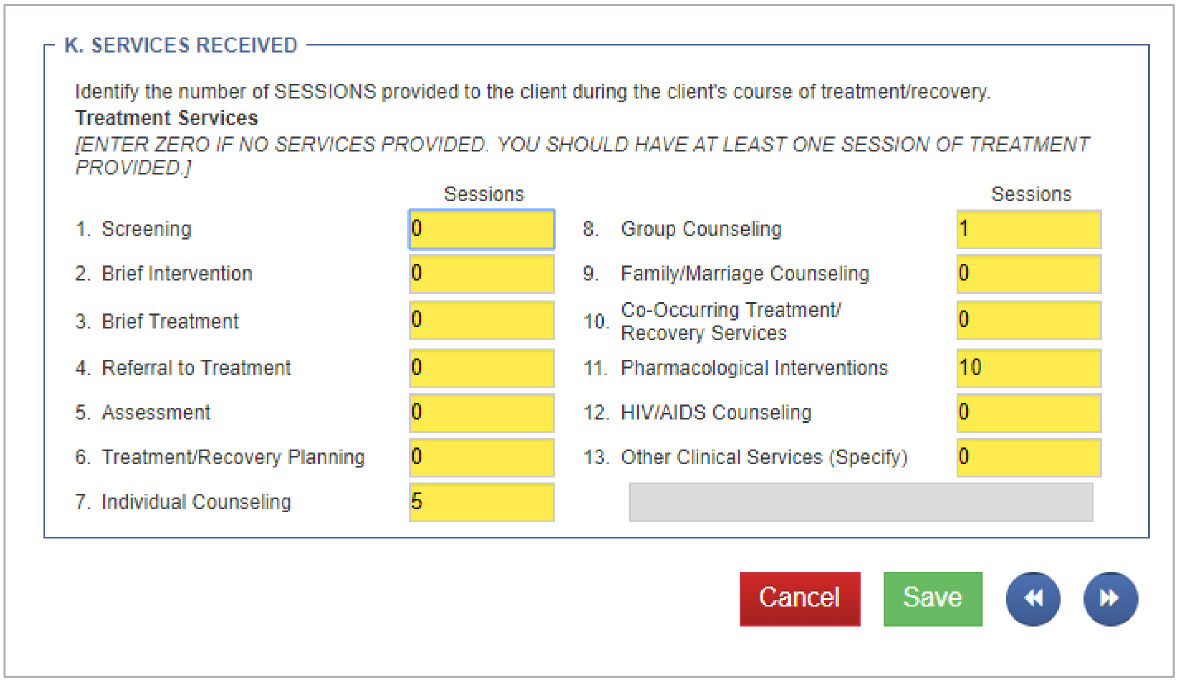
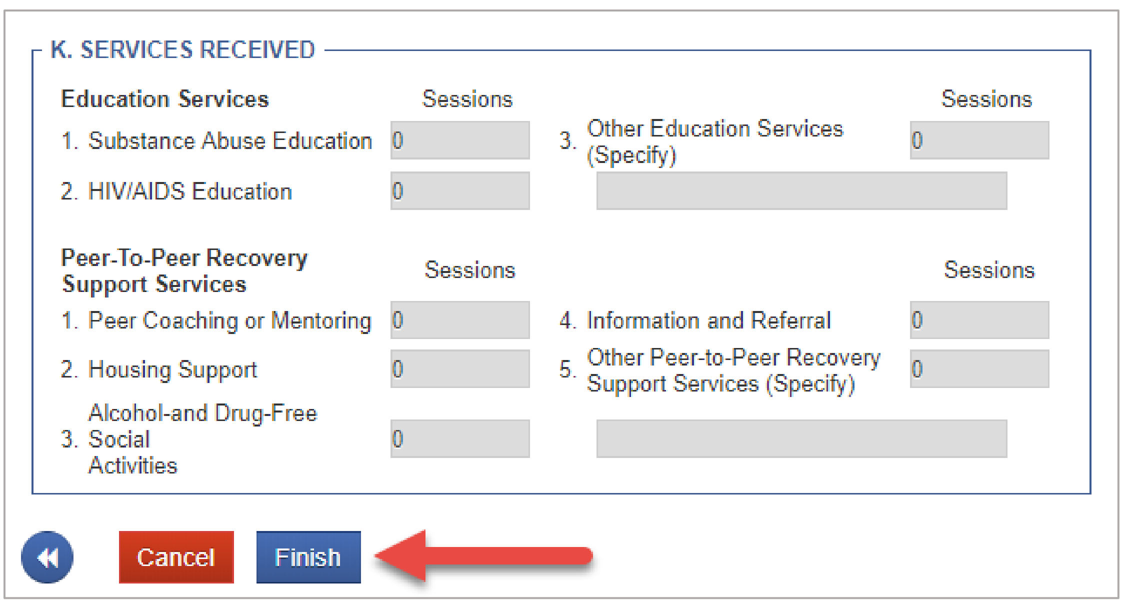


Figure 4-29: Section K. Services Received; Number of Sessions Provided

Please contact your system administrator if you believe encounters exist for this client but the Services Received section is not populated with the number of days and sessions; the mapping of the modalities and services may be incomplete.

9. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.



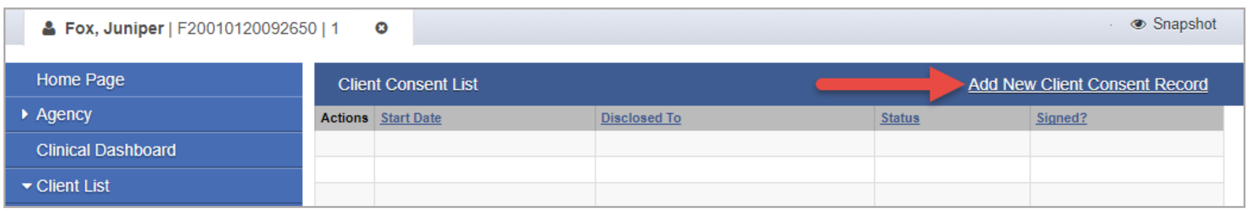
Part 5: Consent and Referrals

Create Client Consent Record

***Where:* Client List > Activity List > Consent**

The consent is a formal process adhering to 42 CFR Part 2, which governs the sharing of client information between agencies and facilities using WITS. A consent may also be used to record the sharing of information (on paper) with agencies who do not use WITS, making the consent part of the electronic health record.

1. On the left menu, click **Client List** and search for a client.
2. Locate the client, hover over the Actions column, and then click **Activity List**.
3. On the left menu, click **Consent**.
4. Click the **Add New Client Consent Record** link.



5. Select **No**.

6. On the Client Disclosure Agreement screen, complete the following fields.

Table 5-1: Client Disclosure Agreement fields

Field	Description
Entities with Disclosure Agreements	Select from the drop-down list. This field will display a list of agencies that have previously created a Disclosure template. This will prepopulate fields in the "Client Information To Be Consented" section, which can then be modified if needed.
System Agency	Select "Yes" if the agency uses WITS.
Disclosed to Agency	Select the agency that will be receiving the client's information.
Facility	Select the facility within the selected Agency that will be receiving the client's information. Select All Facilities, or an individual facility.
Purpose for Disclosure	Type the reason for creating the Consent record.
Earliest date of services to be consented	Select the date.
Has the client signed the paper agreement form	Select "No" to save the screen and have the client sign the paper form (see below), after client has signed, select "Yes".

Field	Description
Date client signed consent	This field will become editable when “Yes” is selected in the previous field.

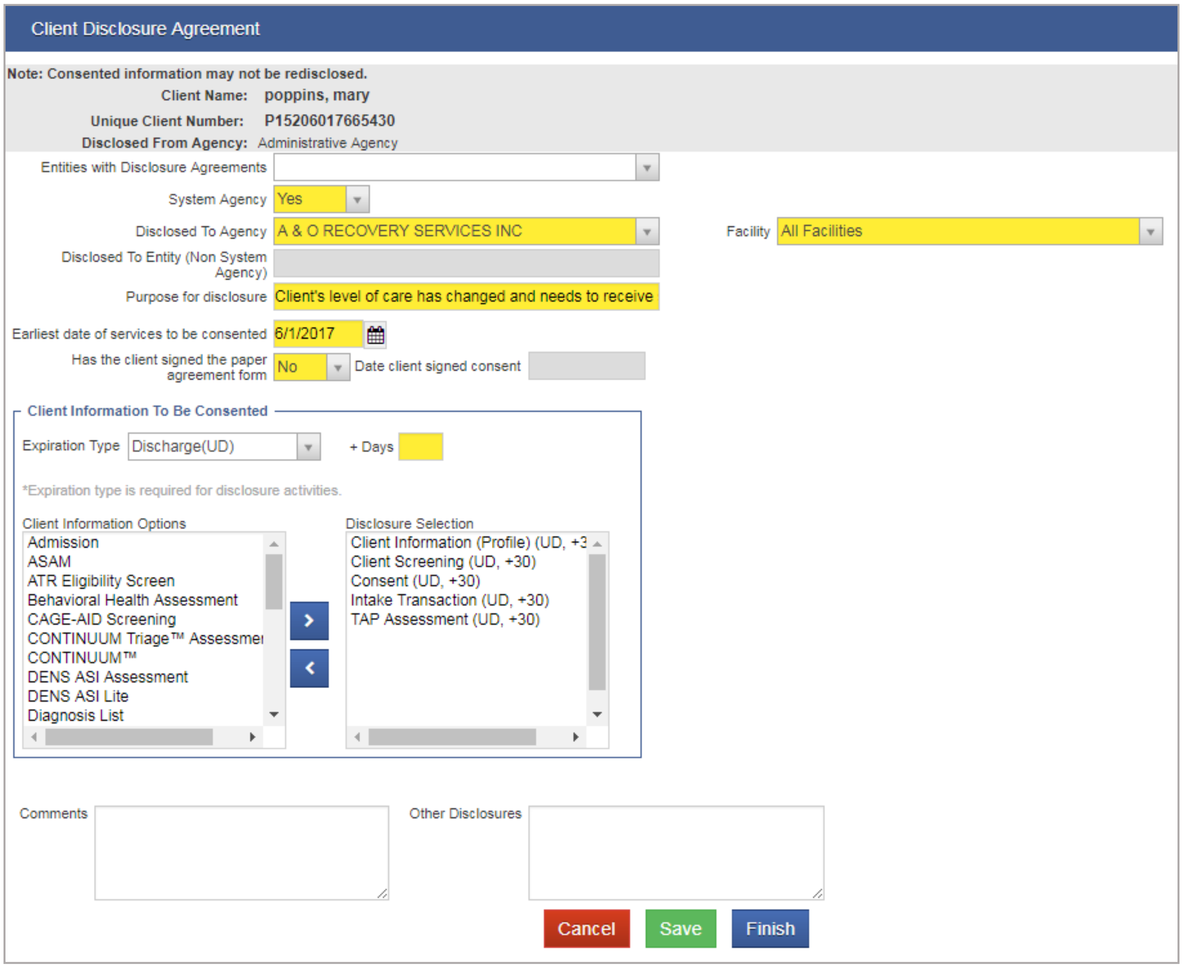


Figure 5-1: Client Disclosure Agreement screen

7. If additional consent information needs to be added or removed from the client’s disclosure agreement, update the options from the “Client Information To Be Consented” section. Your agency administrator may have set up templates for the disclosure agreement.

Table 5-2: Client Information To Be Consented fields

Field	Description
Expiration Type and + Days	Select either “Discharge (UD)” or “Date Signed (DS)”, then when the yellow field appears, enter the number of days the consent will expire.
Client Information Options/Disclosure Selection	Select options from the box and use the mover buttons to add or remove the desired consent options.

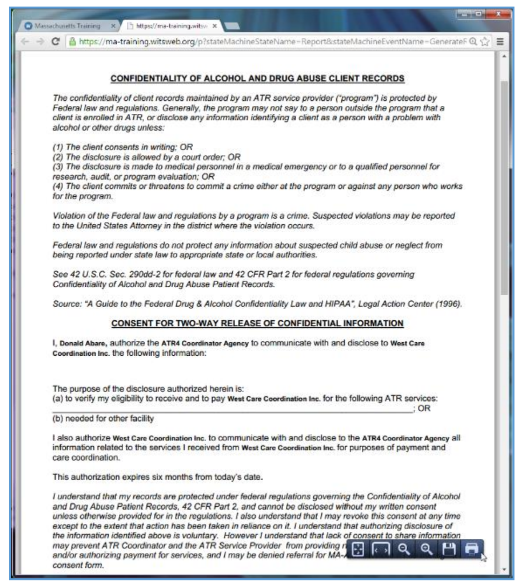
8. When all required fields are complete, click **Save**.

Print the Client Consent Form

9. After saving the Client Disclosure Agreement screen, click the **Generate Report** link to print the Client Consent Form to get the client's signature on the paper copy. The printed consent form includes items from the Client Information Options box along with the Consent Expires information.

Figure 5-2: Client Disclosure Agreement screen, Generate Report

10. Once the client has signed the paper form, update these fields:
    - **Has client signed the paper agreement form**: select "Yes"
    - **Date client signed consent**: defaults to current date
11. Click **Save** and stay on this screen (notice the fields are now grayed out).
12. After saving the client consent, a link to add a Client Referral for this consent will be available. This will open the client referral screen, and will pre-populate the signed consent and Agency fields of the Referred to section.
13. Click the link, **Create Referral Using this Disclosure Agreement**, and continue to the next section.



CONFIDENTIALITY OF ALCOHOL AND DRUG ABUSE CLIENT RECORDS

The confidentiality of client records maintained by an ATR service provider ("program") is protected by Federal law and regulations. Generally, the program may not say to a person outside the program that a client is enrolled in ATR, or disclose any information identifying a client as a person with a problem with alcohol or other drugs unless:

(1) The client consents in writing; OR
(2) The disclosure is allowed by a court order; OR
(3) The disclosure is made to medical personnel in a medical emergency or to a qualified personnel for research, audit, or program evaluation; OR
(4) The client commits or threatens to commit a crime either at the program or against any person who works for the program.

Violation of the Federal law and regulations by a program is a crime. Suspected violations may be reported to the United States Attorney in the district where the violation occurs.

Federal law and regulations do not protect any information about suspected child abuse or neglect from being reported under state law to appropriate state or local authorities.

See 42 U.S.C. Sec. 290dd-2 for federal law and 42 CFR Part 2 for federal regulations governing Confidentiality of Alcohol and Drug Abuse Patient Records.

Source: "A Guide to the Federal Drug & Alcohol Confidentiality Law and HIPAA", Legal Action Center (1996).

CONSENT FOR TWO-WAY RELEASE OF CONFIDENTIAL INFORMATION

I, **Donald Abare,** authorize the **ATR4 Coordinator Agency** to communicate with and disclose to **West Care Coordination Inc.** the following information:

The purpose of the disclosure authorized herein is:
(a) to verify my eligibility to receive and to pay **West Care Coordination Inc.** for the following ATR services: ______; OR
(b) needed for other facility

I also authorize **West Care Coordination Inc.** to communicate with and disclose to the **ATR4 Coordinator Agency** all information related to the services I received from **West Care Coordination Inc.** for purposes of payment and care coordination.

This authorization expires six months from today's date.

I understand that my records are protected under federal regulations governing the Confidentiality of Alcohol and Drug Abuse Patient Records, 42 CFR Part 2, and cannot be disclosed without my written consent unless otherwise provided for in the regulations. I also understand that I may revoke this consent at any time except to the extent that action has been taken in reliance on it. I understand that authorizing disclosure of the information identified above is voluntary. However I understand that lack of consent to share information may prevent ATR Coordinator and the ATR Service Provider from providing [illegible] and/or authorizing payment for services, and I may be denied referral for MA-[illegible] consent form.

Printable Consent Form

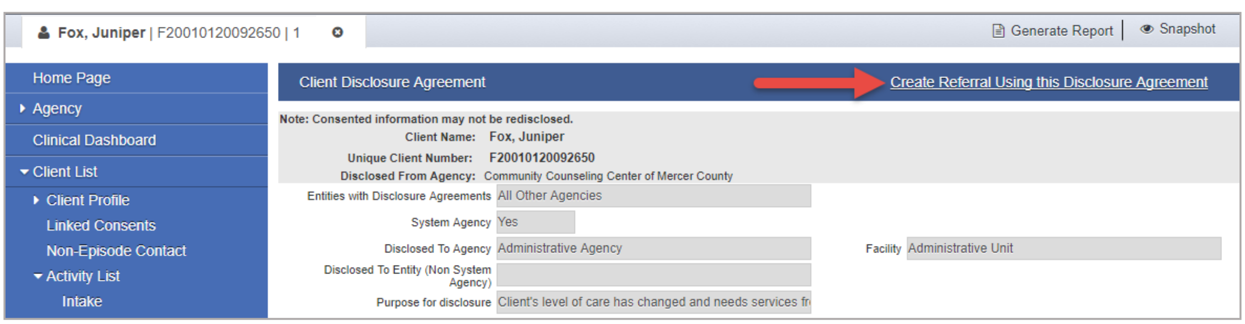


Figure 5-3: Create Referral Using this Disclosure Agreement link

Referrals

Create a Client Referral

***Where:* Client List > Activity List > Referrals**

Continuing from previous section…

Once the Client Consent is complete, create the Client Referral Record. A referral is used when the receiving agency (another WITS agency) will be providing services for the client. Referrals may also be done from one facility to another facility within the same agency.

1. After clicking the **Create Referral Using this Disclosure Agreement** link, the Referral screen will open.

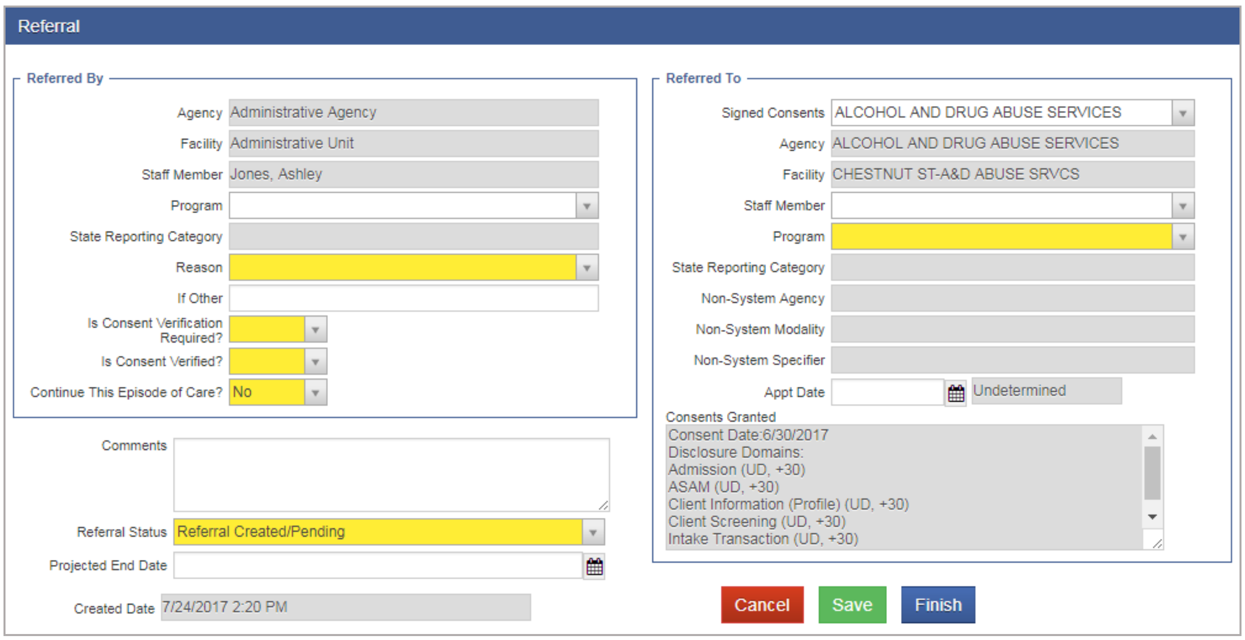


Figure 5-4: Referral screen

2. On the Client Referral screen, complete the required fields in the **Referred By** section, including:

Table 5-3: Referred By fields

Field	Description
Program	Select the Program It should be a referral from a program with the SOR grant to another program with the SOR grant
Reason	In the drop-down field, select the reason why this client is being referred.
Is Consent Verification Required?	Select Yes.
Is Consent Verified?	Select Yes.
Continue Episode of Care?	Select No.
Referral Status	State of the referral (this should be "Referral Created/Pending").

Field	Description
Created Date	Date client is referred.

3. Next, in the **Referred To** section, complete all the required fields, including:

Table 5-4: Referred To fields

Field	Description
Signed Consents	Select the consent from list of available consents.
Agency	This field will auto populate based on the “Consent” selected.
Facility	The facility the client is being referred to.
Program	The program the client is being referred to. It should be an SOR program.

4. When complete, click **Save**.

Viewing Referrals

Referrals In

***Where:* Agency > Agency List > Referrals > Referrals In**

Whenever clients are referred in to your Agency from another agency, a message will appear on the Home Page as shown in Figure 5-5: Home Page with "referred in" notification. Clients who have been referred in have signed a consent form agreeing to share certain information with your agency. To review these referrals, follow the steps below.

Role Needed:

- Referrals (Full Access)

Note: Only users with the Referrals (Full Access) role will see Referrals left menu link.

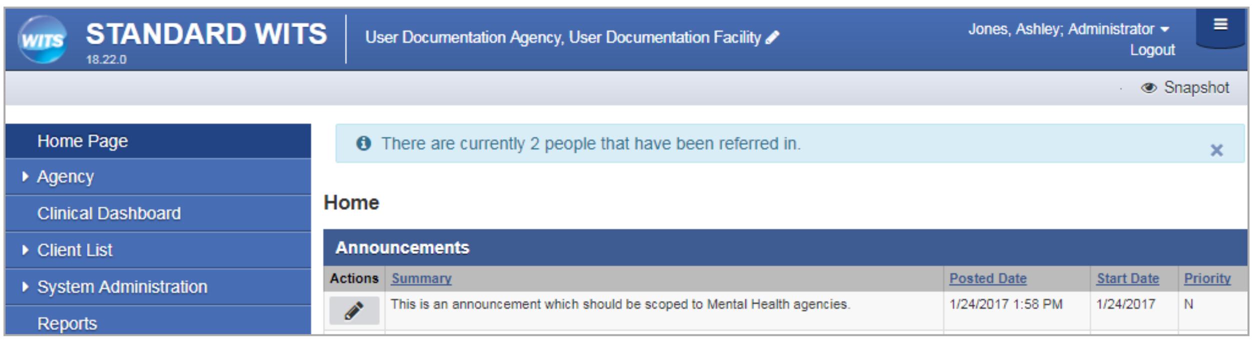


Figure 5-5: Home Page with "referred in" notification

1. On the left menu, click **Agency**, click **Referrals**, and then click **Referrals In**.
2. On the **Referrals In Search** screen, in the **Referral Status Codes** field, select "**Referral Created/Pending**" and move this option to the **Search Criteria** box by clicking the mover button (>) as shown in figure below.
3. After selecting the search criteria, click **Go** to view the search results list.

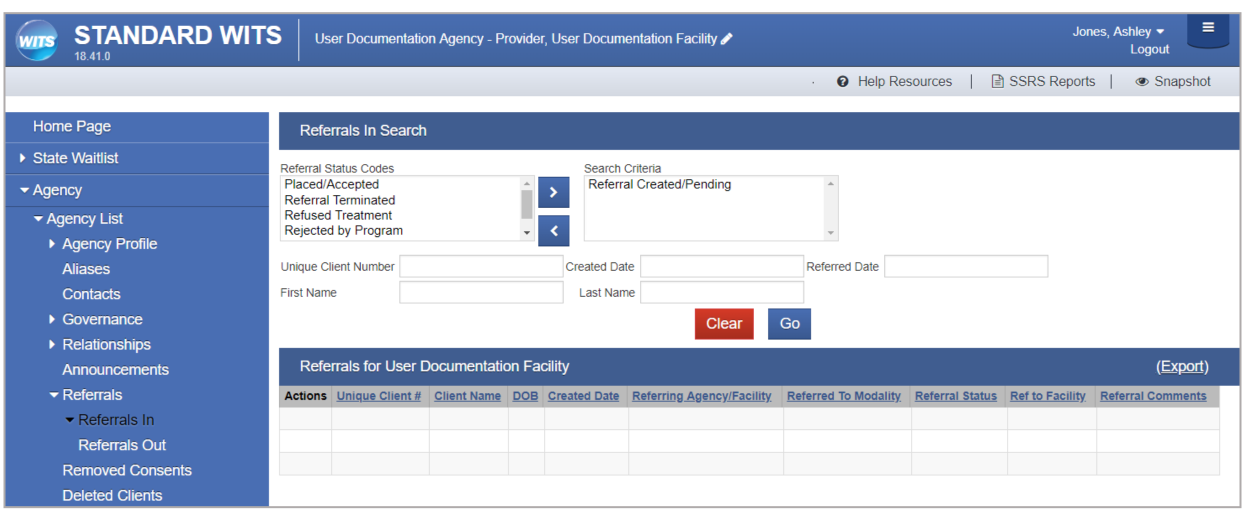


Figure 5-6: Referrals In Search screen

4. Notice that any referred clients will appear in the list portion of the screen. To view a client's referral information, hover over the Actions column, and then click **Review**.

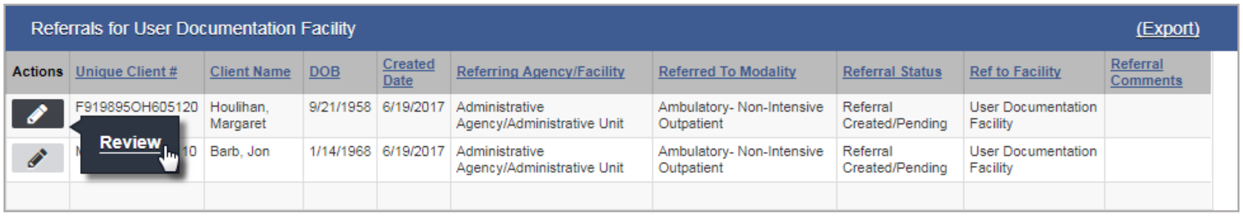


Figure 5-7: Referrals Search Results, Review link

5. To accept the client referral, click on the **Referral Status** field and select "**Placed/Accepted**" from the drop-down list. The client must be accepted into your agency before viewing the client's record, or working on the case.

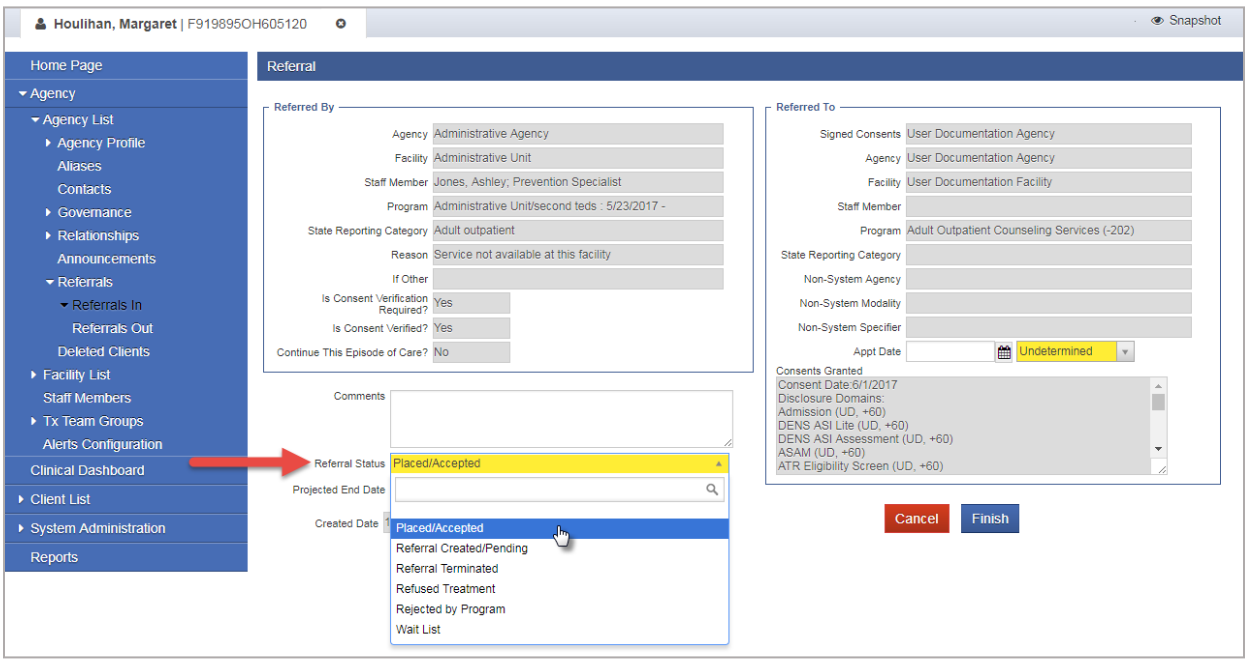


Figure 5-8: Referral screen, Referral Status field

6. (Optional) Next, fill in the **Appointment Date (Appt Date)** and use the drop down box to provide any additional information about the appointment.

7. Click **Finish** to save the record and accept the referral. Note that this action takes you to the Client Profile screen for the client you just accepted.

(Optional) Additional **Referral Status** reasons to select:

- **Referred/Terminated**: When the referral has been deleted by the referring agency.
- **Refused Treatment**: Select if the client does not want to be treated.
- **Rejected by Program**: If the client is not eligible or is not acting in compliance.
- **Wait List**: If the client is waiting for a slot to open in the program.

Note: Once the referral is Placed/Accepted, the client record is created within the Agency, and an Intake and Client Program Enrollment is created within the referred to Facility.

Referrals Out

***Where:* Agency > Agency List > Referrals > Referrals Out**

The Referrals Out screen is used to check the status of referrals made from your agency to other agencies.

1. On the left menu, click **Agency**, click **Referrals**, and then click **Referrals Out**.
2. On the **Referrals Out Search** screen, in the **Referral Status Codes** field, select the desired codes and move them to the **Search Criteria** box by clicking the mover button (>).
3. After selecting the search criteria, click **Go** to view the search results list.

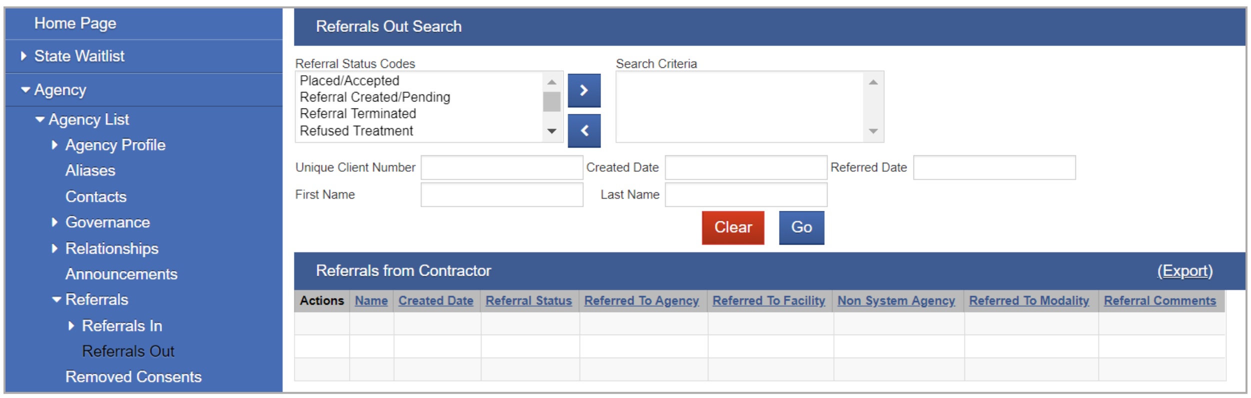


Figure 5-9: Referrals Out screen

Removed Consents

Where:* *Agency* > *Agency List* > *Removed Consents

This screen displays clients with consents that have been removed. This is typically done if a client is no longer in treatment at your agency. To help easily manage the number of clients with consents from outside agencies on the Client List screen, users with the Clinical Supervisor role can "remove" consented clients from the list.

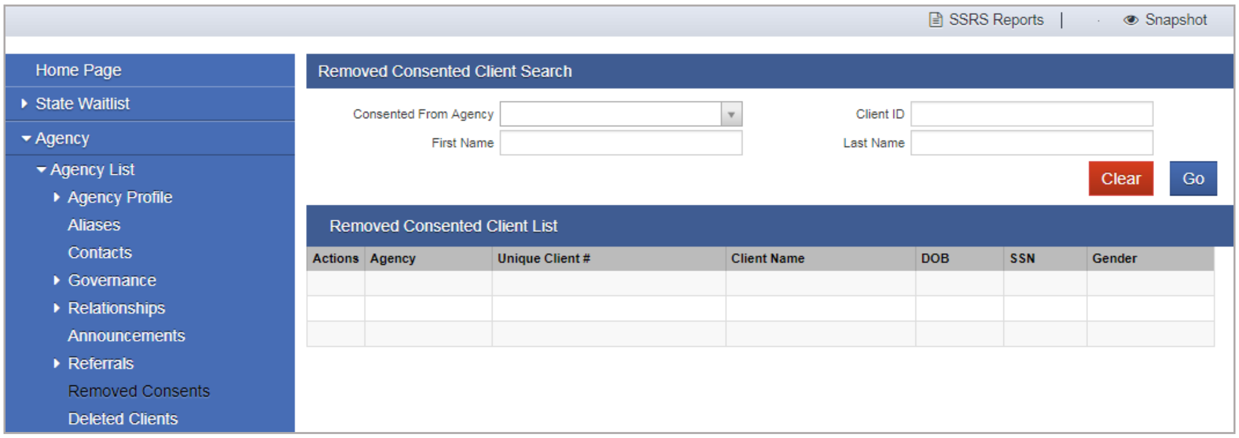


Figure 5-10: Removed Consents screen

Part 6: Encounters

Create Encounter Notes

Where:* *Client List* > *Activity List* > *Encounters

1. On the left menu, click **Client List** and search for a client.
2. Hover over the Actions column and click **Activity List**.
3. On the left menu, click **Encounters**. This will display the Encounter Search/List screen.
4. To view previous encounters, complete the search fields and click **Go**.
5. To create a new encounter, click **Add Encounter**.

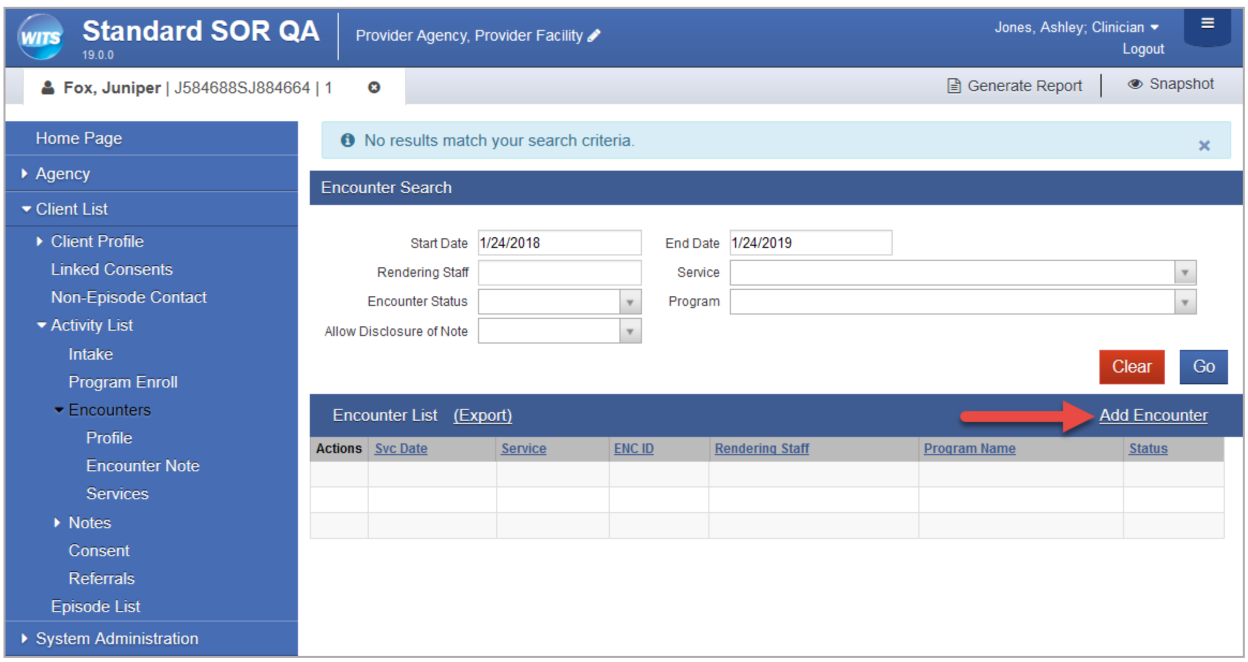


Figure 6-2: Encounter screen, Add Encounter

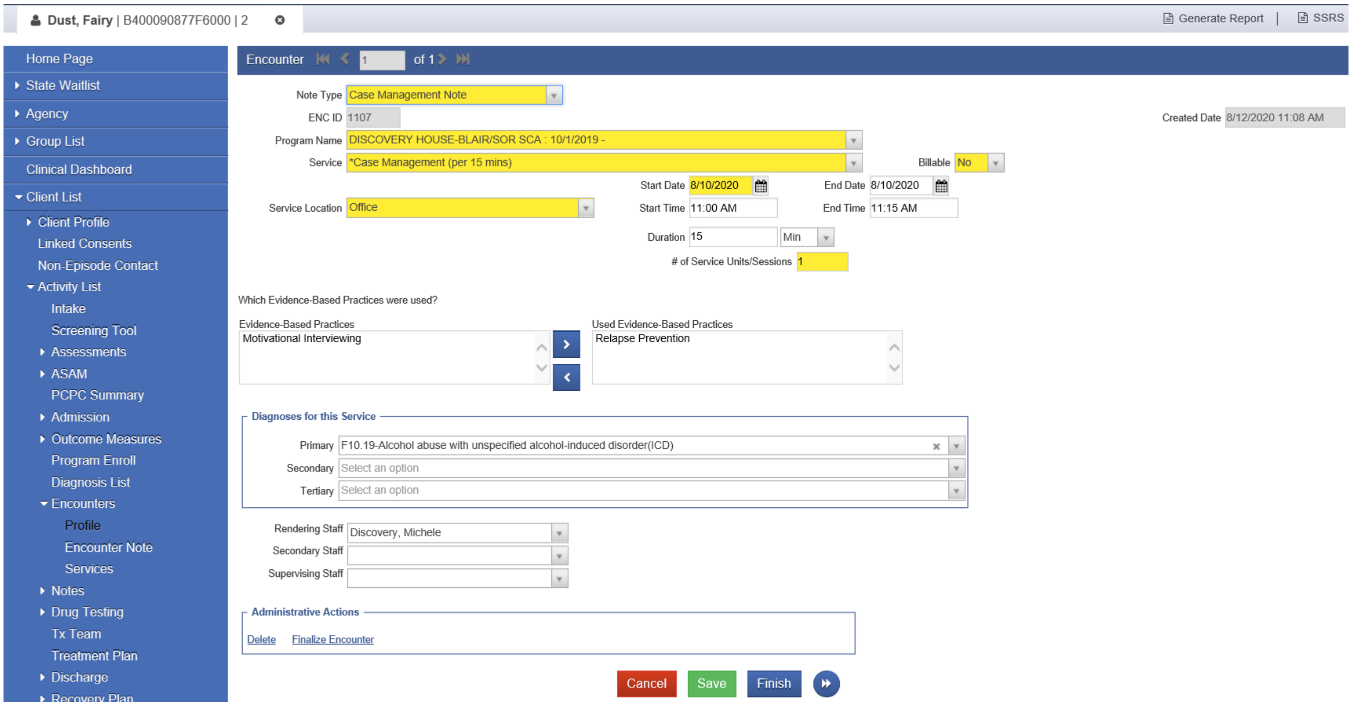
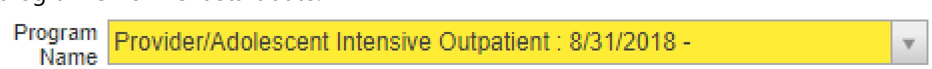
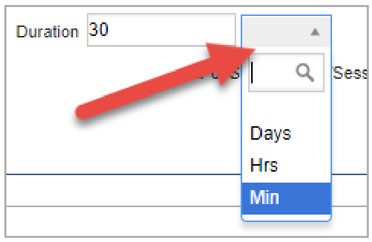
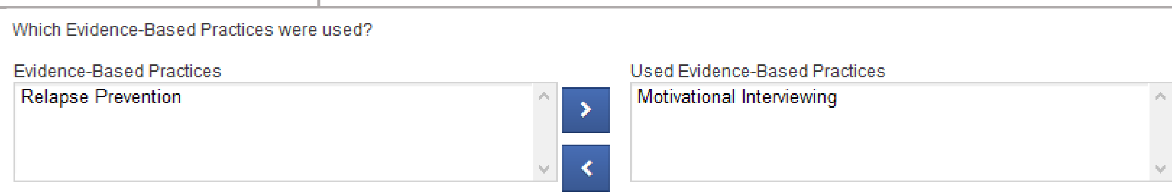


Figure 6-1: Encounter Profile screen with EBP field

6. Complete the fields on the Encounter Profile screen. See table below for information on each field.

Table 6-1: Encounter Profile fields

Field	Description
Note Type	Select from the drop-down field.
ENC ID	Read-only field. When the encounter is saved, this field will display its unique ID number.
Created Date	Read-only field. This field will display the date and time when the encounter is saved.
Program Name	This field will pre-populate with the client's current program enrollment name and program enrollment start date. 
Service	Select a service from the drop-down list.
Billable	This field may be pre-populated with Yes or No.
Service Location	Select an option from the drop-down list. This field may be pre-populated if this information was added to the facility profile.
Start Date	Enter the date when this service was rendered. **Note**: The start date for this encounter must occur within the same program enrollment period. Encounter date cannot be before the intake date.
Start Time	Enter the time when this service was rendered. This field may be optional or required depending on the selected service. Some services may be set up to require this information.
End Date	Enter the date when this service ended. This field may be optional or required depending on the selected service. Some services may be set up to require this information.

Field	Description
	Note: The end date for this encounter must occur within the same program enrollment period.
End Time	Enter the time when this encounter ended. This field may be optional or required depending on the selected service. Some services may be set up to require this information.
Duration	In the Duration field, type an integer to record time spent for this encounter. In the Duration drop-down field, select the unit of time. **Note**: The duration field will only accept whole numbers. Decimals (e.g., 0.5) are not accepted.  These fields may be optional or required depending on the selected service. Some services may be set up to require this information.
# of Service Units/Sessions	Type an integer representing the number of units or sessions spent for this service. Your administrator may have established policy guidelines regarding how services are recorded.
Evidence-Based Practices	
Which Evidence-Based Practices were used?	Select options from the box and use the mover buttons to add or remove the Evidence-Based Practices options. (Optional)
	
Diagnoses for this Service	
Primary	(Optional) This field will pre-populate with the client's primary diagnosis based on the encounter start date.
Secondary	(Optional) This field will pre-populate with the client's secondary diagnosis based on the encounter start date.
Tertiary	(Optional) This field will pre-populate with the client's tertiary diagnosis based on the encounter start date.
Rendering Staff	This field will pre-populate to the user logged in. To change the rendering staff, select the correct staff member from the drop-down list.
Supervising Staff	(Optional) In the drop-down list, select the Supervisor for the Rendering Staff member, if applicable. **Note**: Declaring staff members as "supervisors" is a feature controlled through the staff member's profile by adding relationships.

7. Click **Save**, and then click the **right-arrow**.

Encounter Notes section of the Encounter allows the staff to enter notes related to the time spent with the client. If the client has an Active Treatment Plan, the staff can add Goals, Objectives, and Interventions to the encounter.

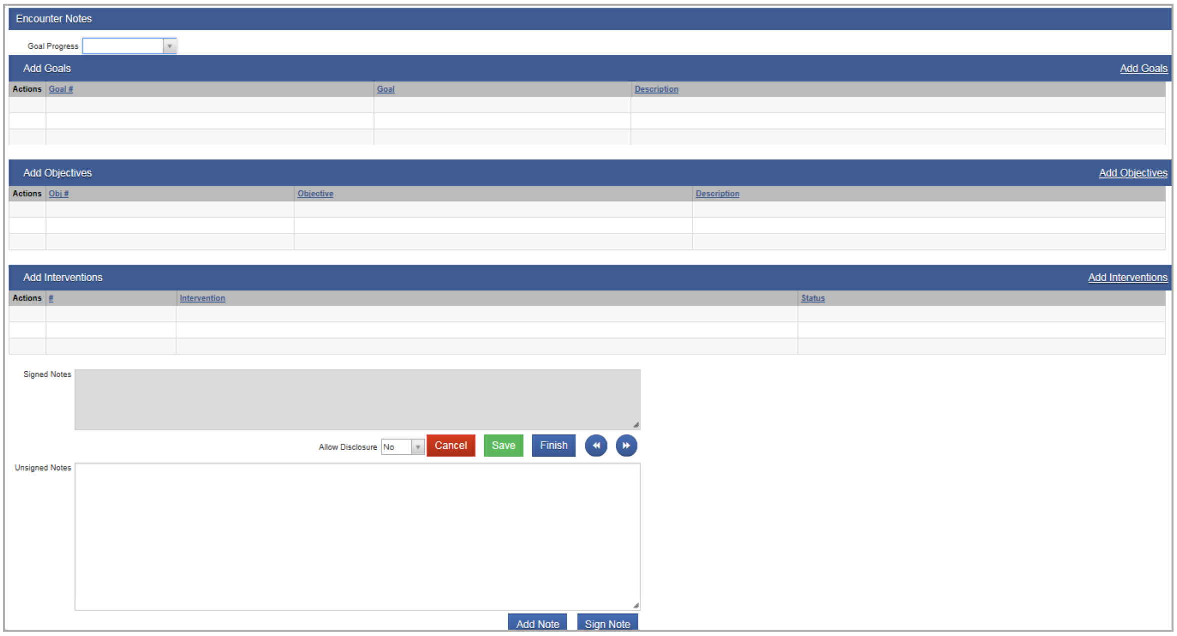


Figure 6-4: Encounter Note, Add Goals, Objectives, and Interventions

Part 7: Overdose Reversal Kit

Where: Agency > Overdose Reversal Kit

Required Role(s):

- Overdose Reversal Kits Management (Full Access)
- Overdose Reversal Kits Management (Read Only)

As part of the SOR reporting requirements, grantees must provide on a quarterly basis the number of naloxone kits purchased and distributed with the SOR funds. This new module has been created to track three (3) types of events:

Event Types:

- Naloxone Purchase
- Naloxone Distribution
- Naloxone Administration

Note: Please refer to the WITS Basics User guide, **Part 1: System Icons** for information on the screen conventions for the Overdose Reversal screens.

Add New Overdose Reversal Kit Event

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. Click **Create New Overdose Reversal Kit Event**.

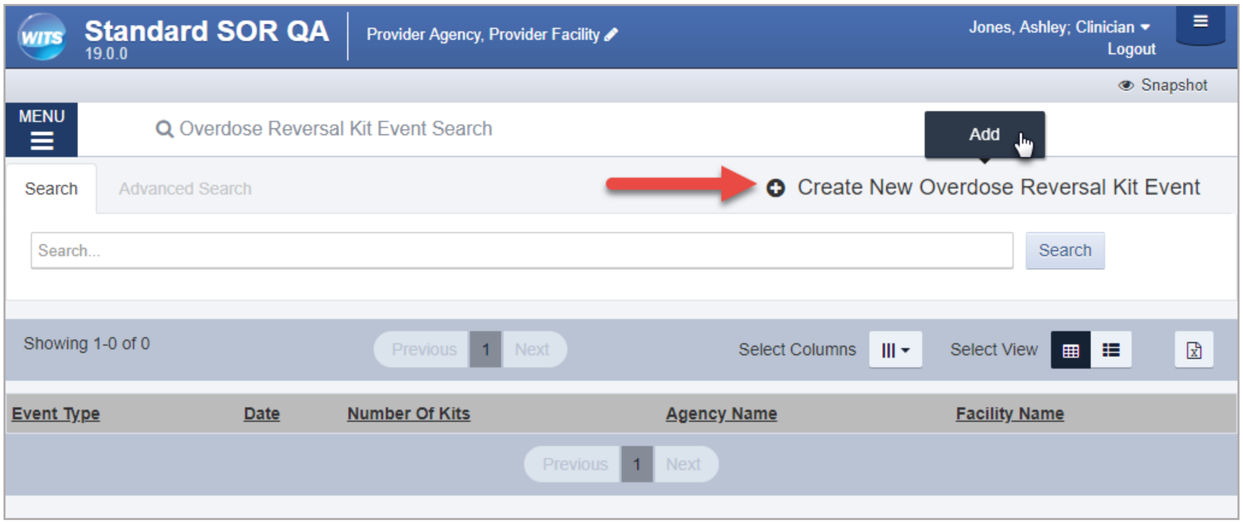
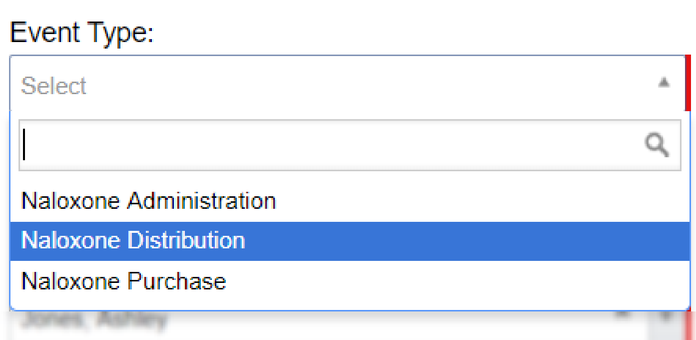


Figure 7-1: Create New Overdose Reversal Kit Event

3. On the **Add Overdose Reversal Kit Event** dialog box, complete the fields as shown in the table below.

Table 7-1: Add Overdose Reversal Kit Event dialog box fields

Field	Description
Agency	Defaults to the current agency name. **Note**: The selected agency cannot be updated once this dialog box is saved.
Facility	Defaults to the current facility name. **Note**: The selected facility cannot be updated once this dialog box is saved.
Event Type	Select an event type from the drop-down list. **Note**: The selected event type cannot be updated once this dialog box is saved. 
Date	Defaults to the current date.
Staff Member	Defaults to the current staff member logged in.

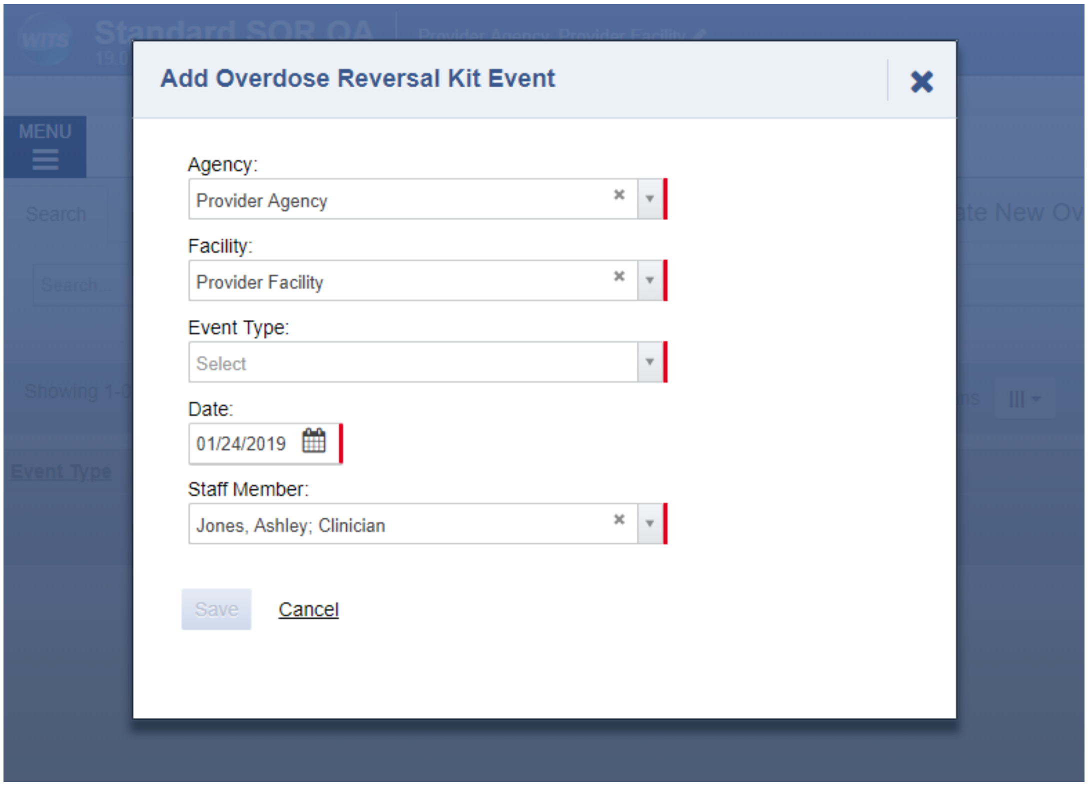


Figure 7-2: Overdose Reversal Kit Event dialog box

4. Click **Save**. This will open the Event Workspace screen.

Naloxone Purchase

To record when Naloxone was purchased, follow the steps below.

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. Click **Create New Overdose Reversal Kit Event**.
3. On the **Add Overdose Reversal Kit Event** dialog box, in the **Event Type** field, select **Naloxone Purchase** from the drop-down list.

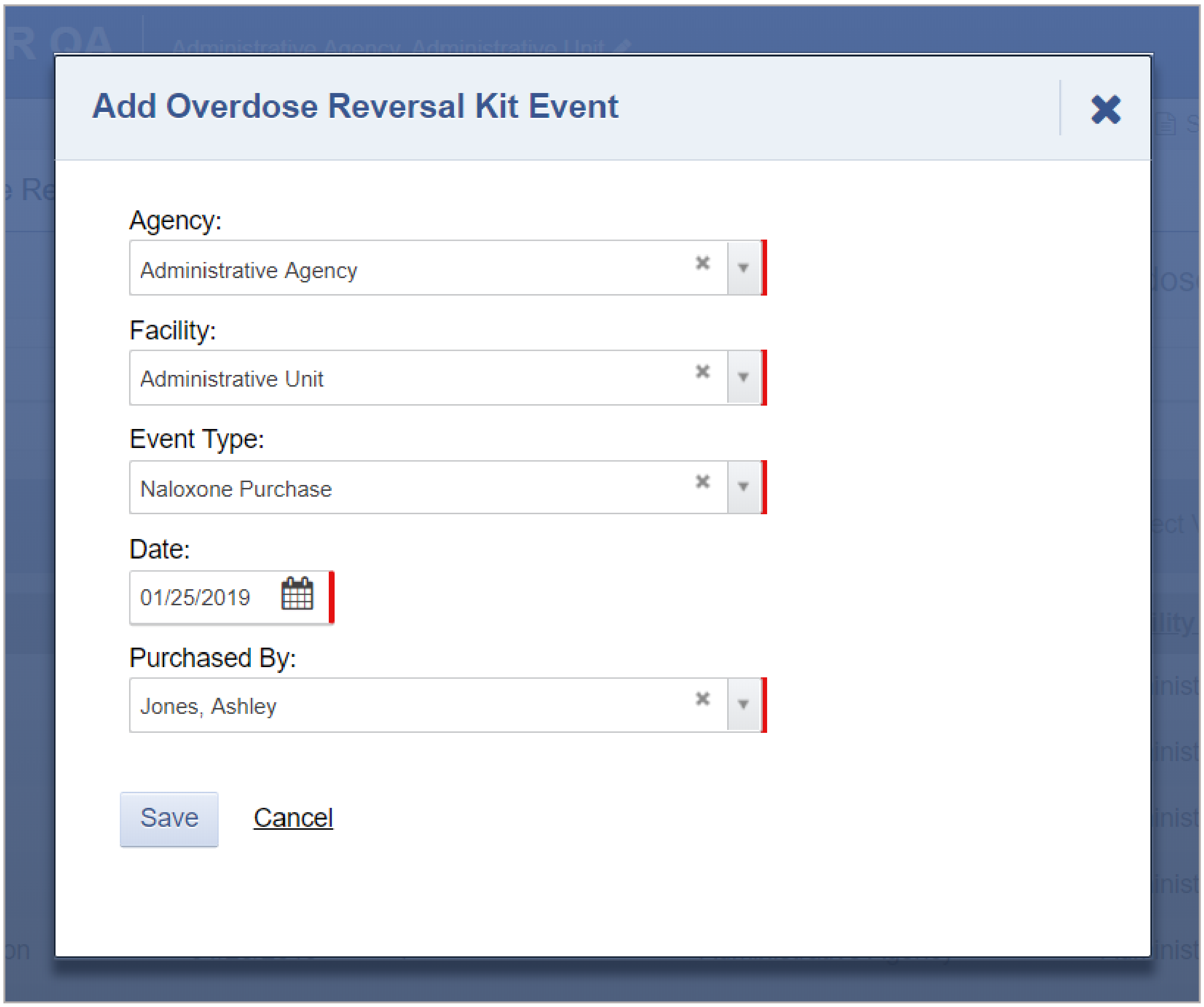


Figure 7-3: Add Overdose Reversal Kit Event dialog box, Naloxone Purchase

4. Update the other fields as applicable. Click **Save**. This will open the Purchase Event Workspace screen.

Panel: Event

1. On the **Purchase Event Workspace** screen, in the **Event** panel, click the **pencil icon** to edit the event information.

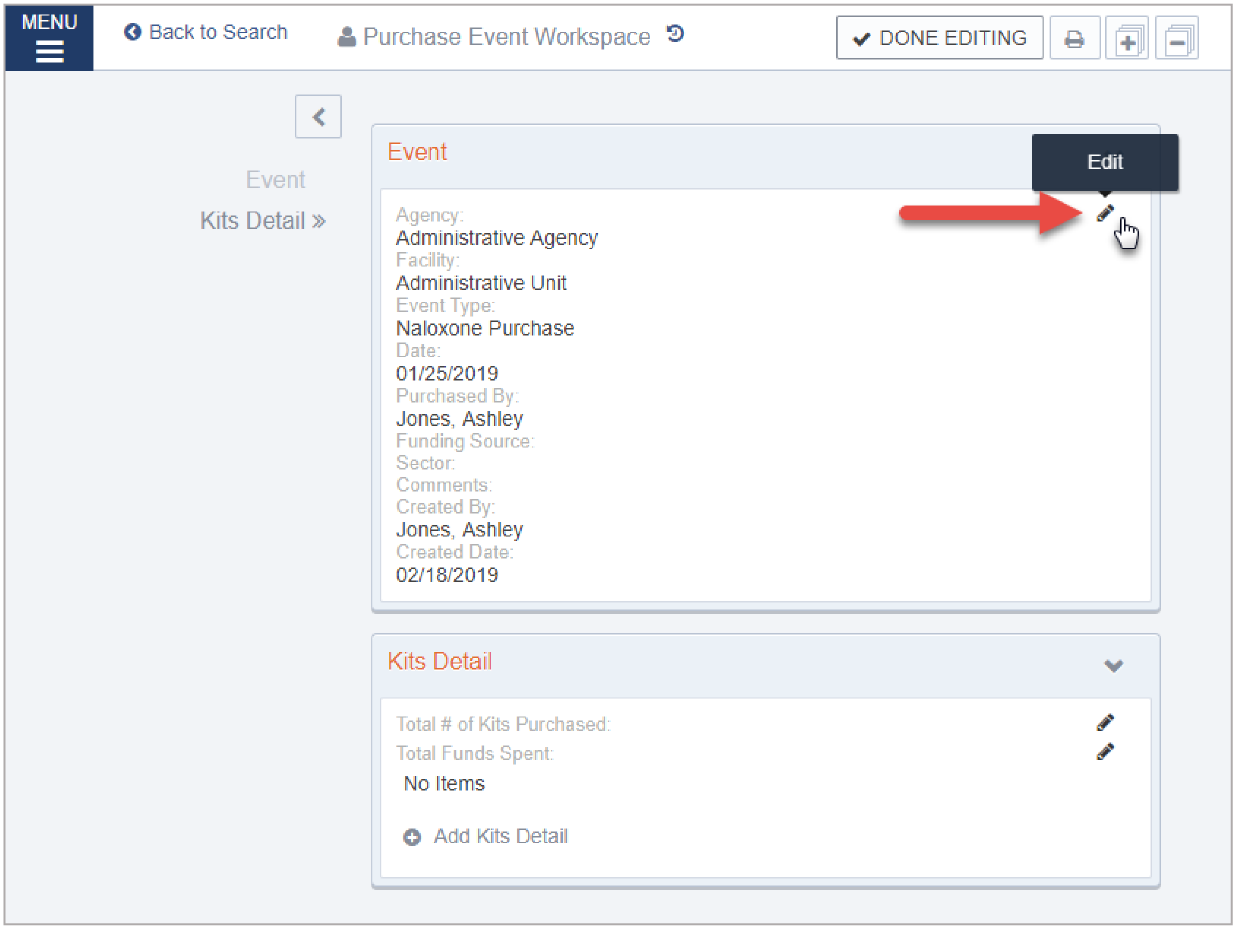
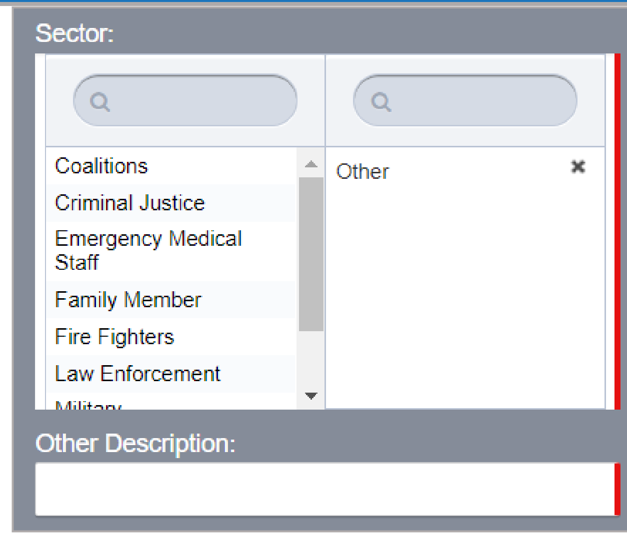


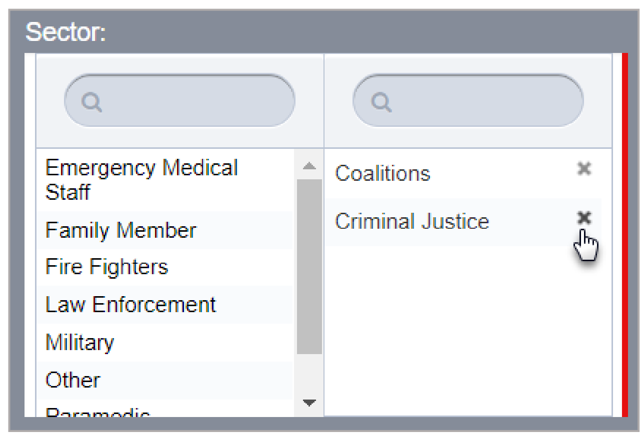
Figure 7-4: Purchase Event, edit Event panel

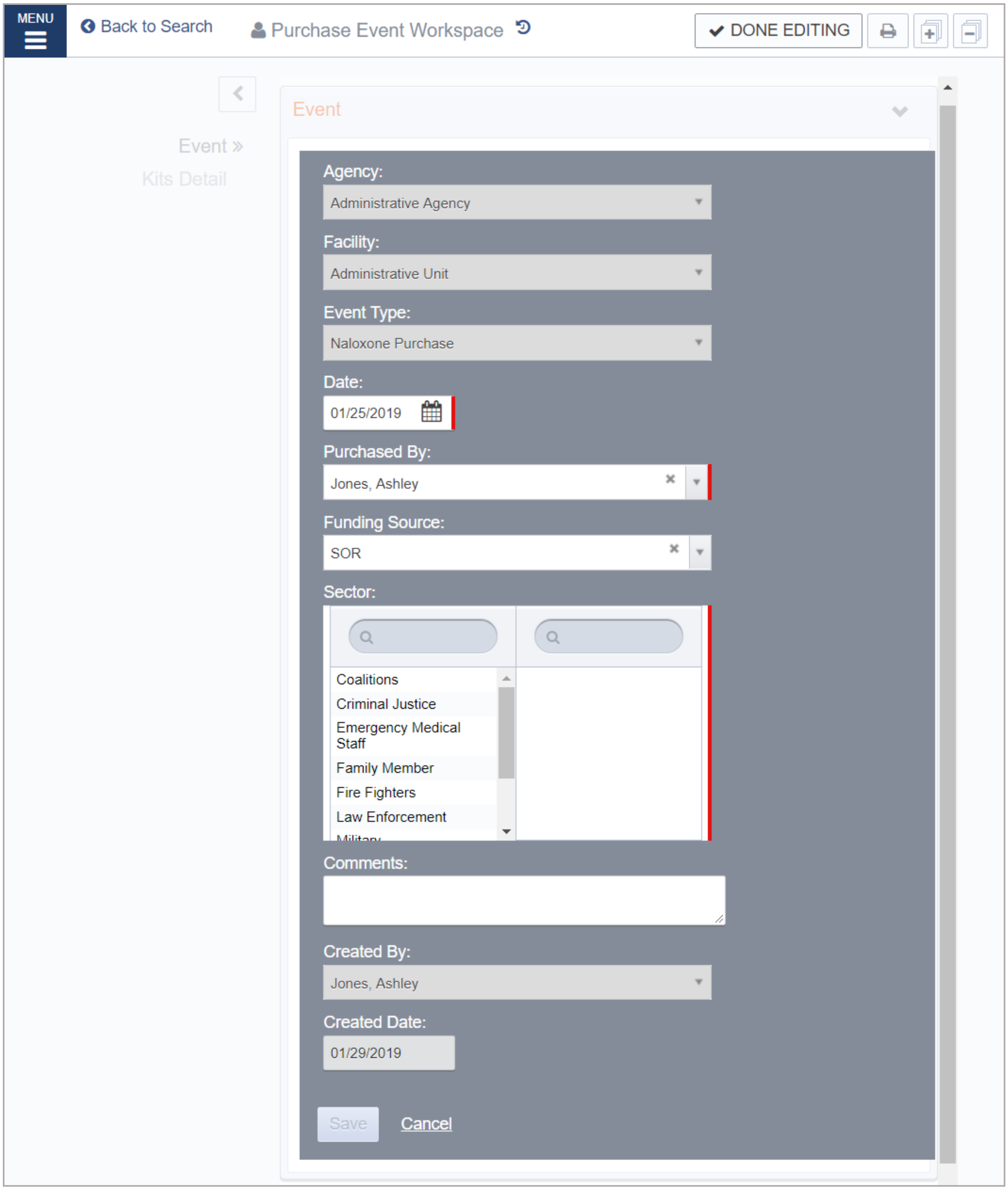
2. In the **Event** panel, update the fields as shown in the table below.

Table 7-2: Purchase Event fields

Field	Description
Agency	Read-only field.
Facility	Read-only field.
Event Type	Read-only field displaying Naloxone Purchase.
Date	Update the date as applicable.
Purchased By	Update the name as applicable.
Funding Source	(Optional) Select the appropriate value from the drop-down list. SOR may be the funding source paying for this event.
Sector	Select one or more sectors from the left box by clicking the name of each sector. If "Other" is selected, complete the required field, **Other Description**.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>

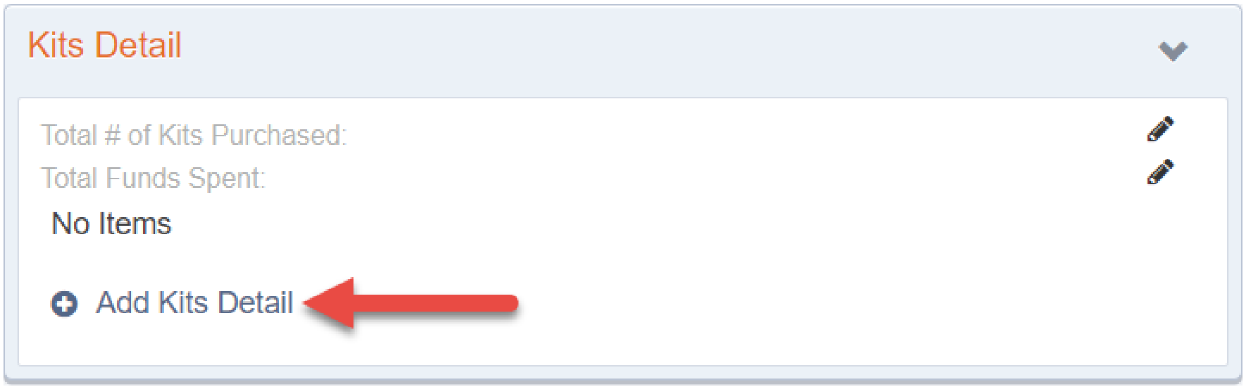
To remove a selected sector, click the ‘X’ beside the sector’s name.

</td></tr>
<tr><td>Comments</td><td>(Optional) Type comments about this event as applicable.</td></tr>
<tr><td>Created By</td><td>Read-only field displaying the staff member who created the record.</td></tr>
<tr><td>Created Date</td><td>Read-only field displaying the date the record was created.</td></tr>
</table>


MENU
Back to Search
Purchase Event Workspace
DONE EDITING
Event »
Kits Detail
Event
Agency:
Administrative Agency
Facility:
Administrative Unit
Event Type:
Naloxone Purchase
Date:
01/25/2019
Purchased By:
Jones, Ashley
Funding Source:
SOR
Sector:
Coalitions
Criminal Justice
Emergency Medical Staff
Family Member
Fire Fighters
Law Enforcement
Comments:
Created By:
Jones, Ashley
Created Date:
01/29/2019
Save
Cancel

Panel: Kits Detail

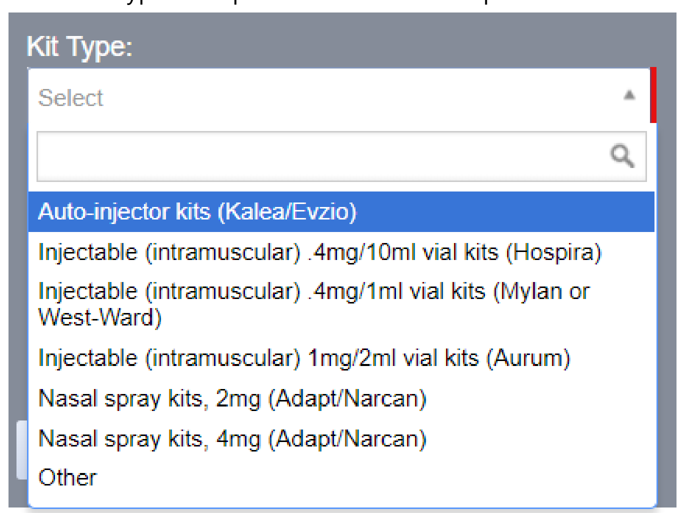
Option 1: Add Kit Type, Number, and Cost

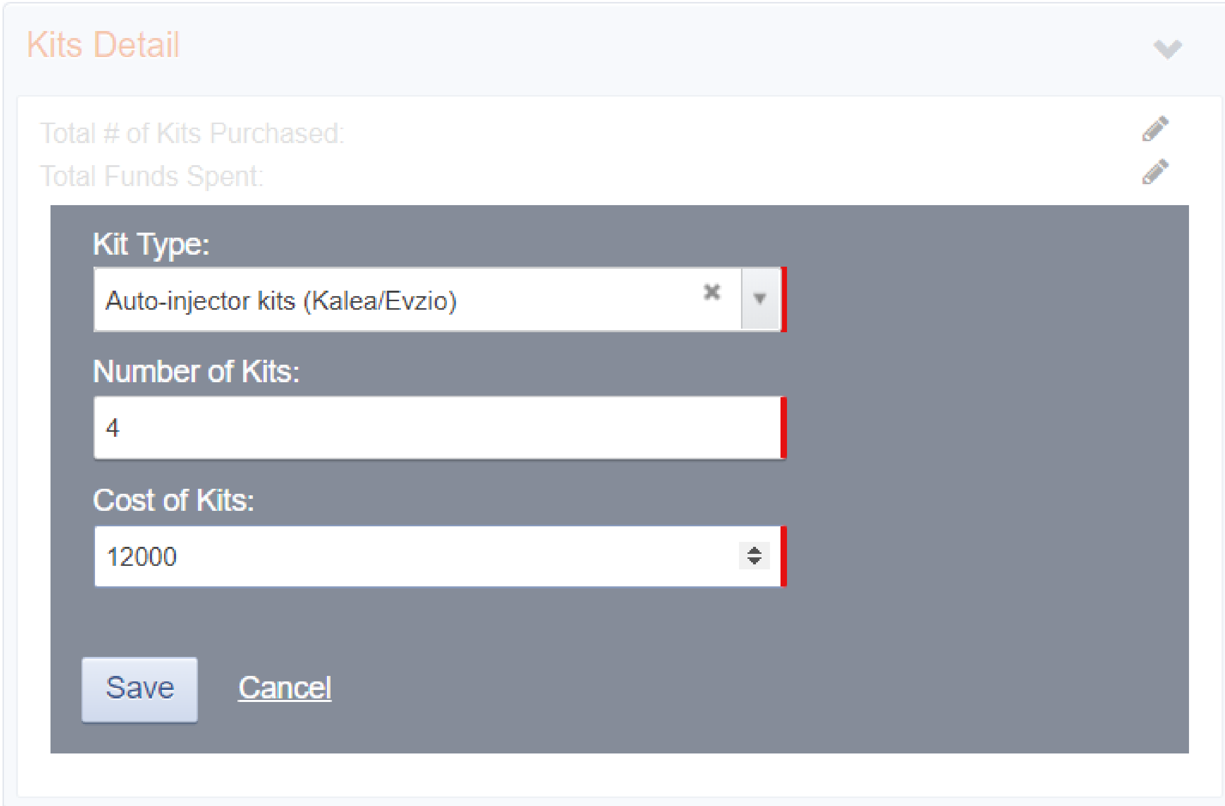
1. If you know detailed information about the type(s) of kit(s) purchased, in the **Kits Detail** panel, click **Add Kits Detail**.



2. In the **Kits Detail** panel, complete the fields as shown in the table below.

Table 7-3: Kits Detail fields

Field	Description
Kit Type	Select the type of kit purchased from the drop-down list. 
Number of Kits	Type an integer.
Cost of Kits	Type an integer (whole numbers).



3. Click **Save**.
4. Continue adding additional kits as needed by clicking Add Kits Detail.

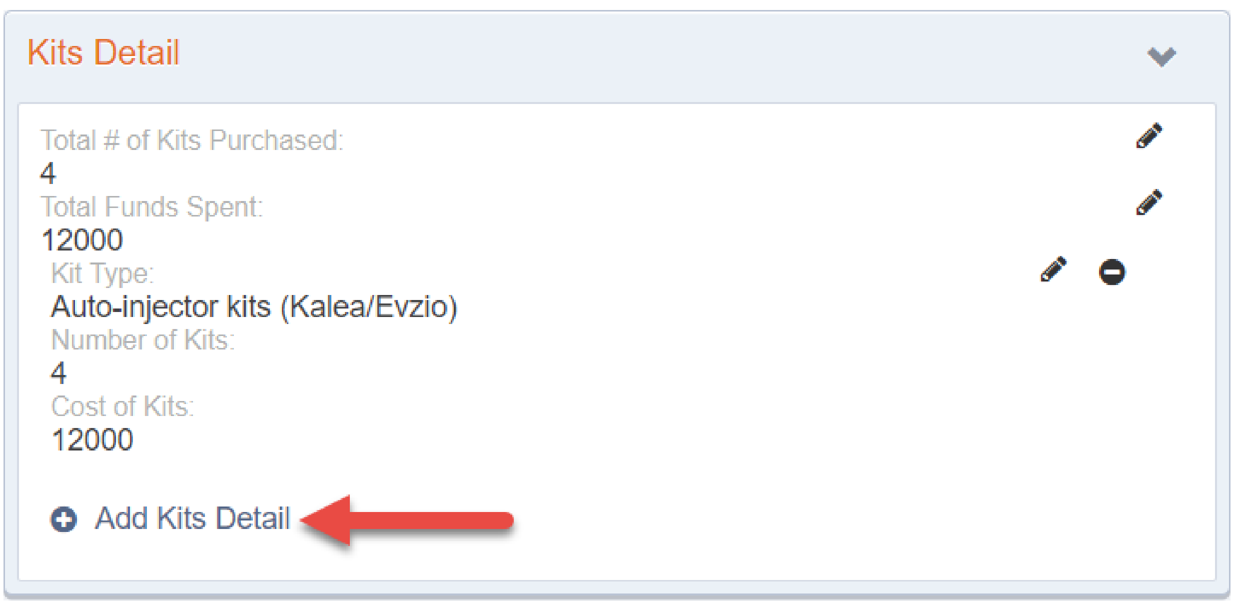


Figure 7-5: Add additional Kits

As you add various Kit Types, the Number of Kits and Cost of Kits, WITS will automatically add those values and display in the Total fields at the top of the Kits Detail screen.

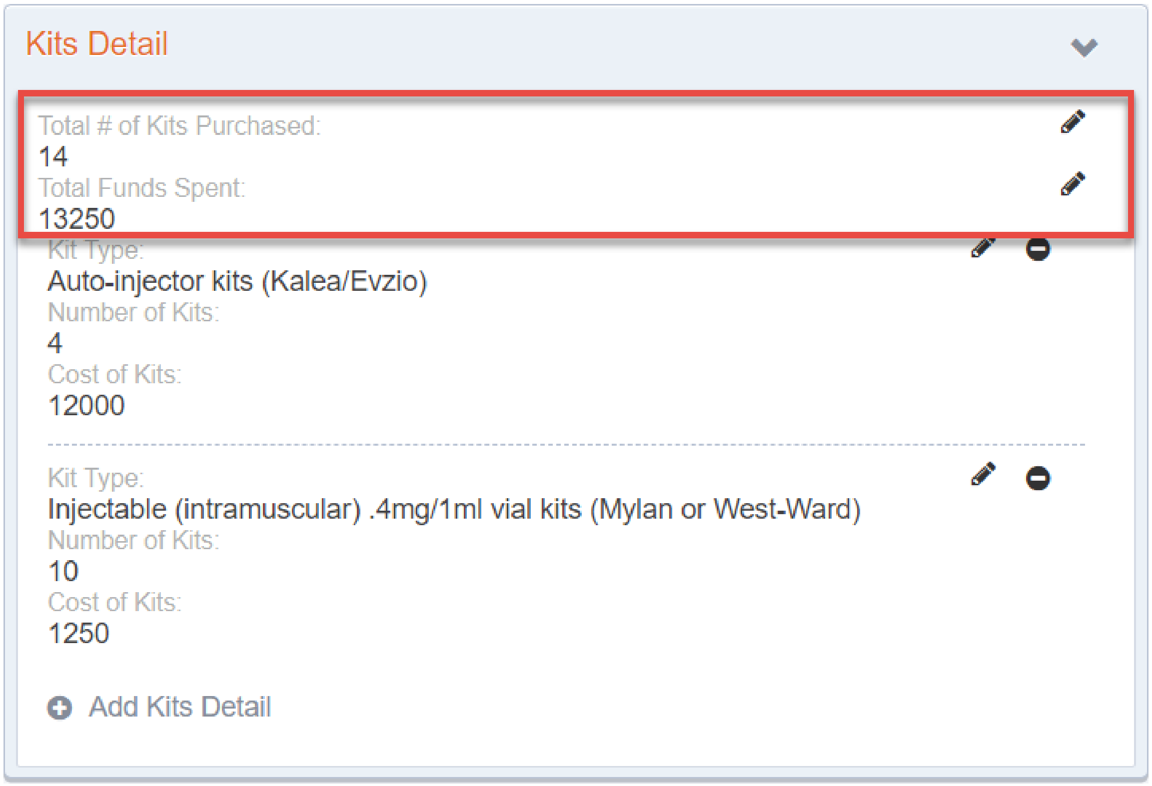


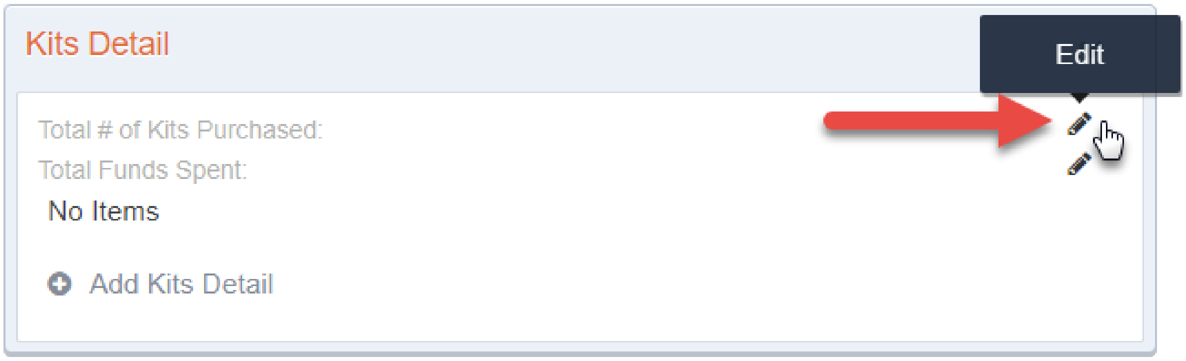
Figure 7-6: Kits Detail panel with Total numbers

Option 2: Add Kit Numbers Only

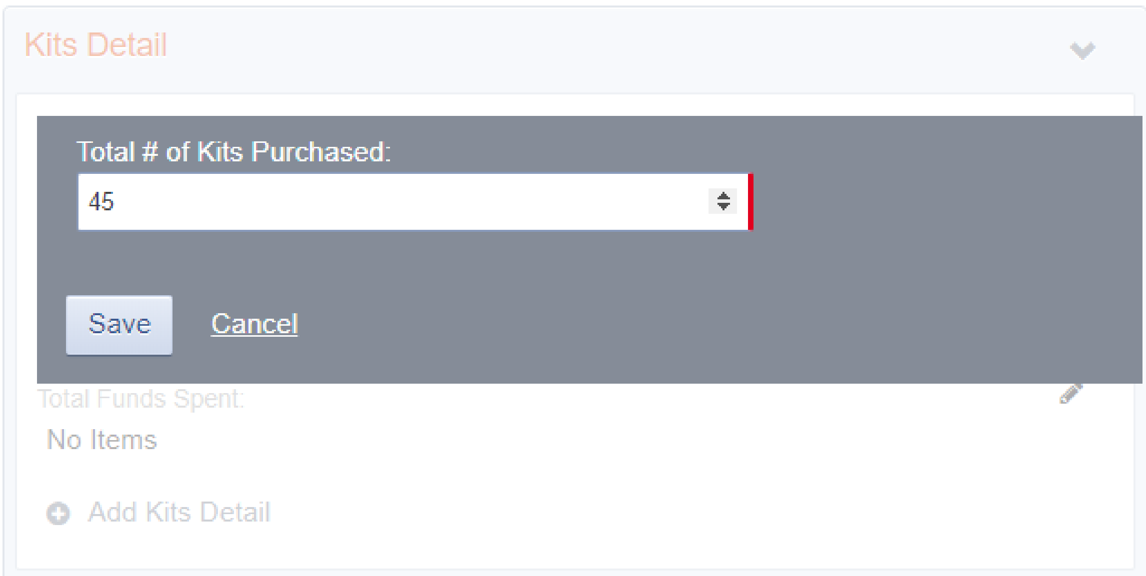
If you do not know the type(s) of kit(s) that were purchased, you may directly enter the **Total # of Kits Purchased** and/or the **Total Funds Spent**.

Note: If you later decide to add details for each kit purchased, then the values previously entered in the fields, **Total # of Kits Purchased** and **Total Funds Spent** will automatically be replaced by the total amounts entered when adding kits detail.

1. To add the total number purchased, in the **Kits Detail** panel, click the top **pencil icon**.



2. In the field, **Total # of Kits Purchased**, type an integer.



3. Click **Save**.

4. To add the total funds spent for this purchase, in the **Kits Detail** panel, click the bottom **pencil icon**.

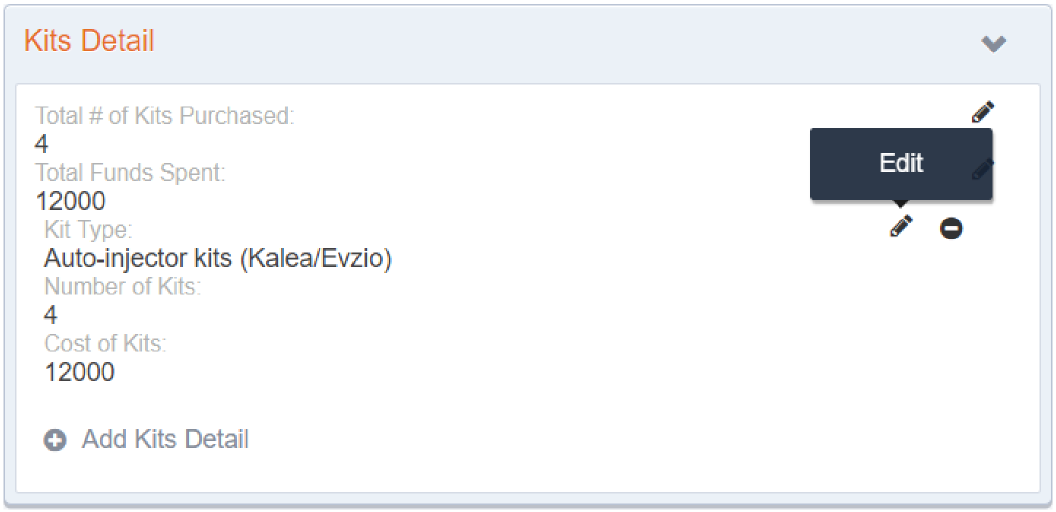
5. In the field, **Total Funds Spent**, type an integer (whole numbers).


Kits Detail
Total # of Kits Purchased:
Total Funds Spent:
1250
Save
Cancel
No Items
Add Kits Detail

6. Click **Save**.

Additional Steps/Related Information

To update kit information, click the **Edit** icon.



To delete a kit type, click the **Remove** icon and then select either **Yes** or **No**.

Naloxone Distribution

To record when Naloxone was distributed, follow the steps below.

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. Click **Create New Overdose Reversal Kit Event**.
3. On the **Add Overdose Reversal Kit Event** dialog box, in the **Event Type** field, select **Naloxone Distribution** from the drop-down list.

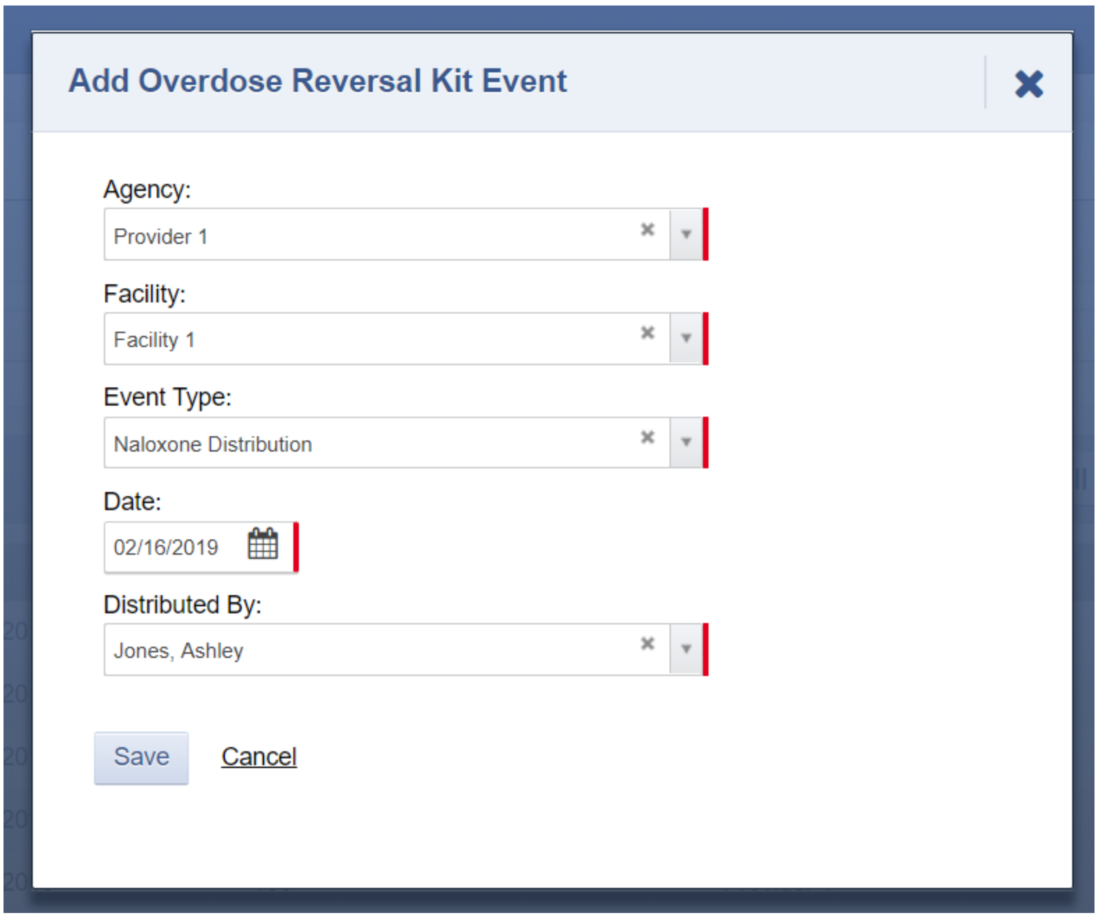


Figure 7-7: Add Overdose Reversal Kit Event dialog box, Naloxone Distribution

4. Update the other fields as applicable. Click **Save**. This will open the Distribution Event Workspace screen.

Panel: Event

1. On the **Distribution Event Workspace** screen, in the **Event** panel, click the **pencil icon** to edit the event information.

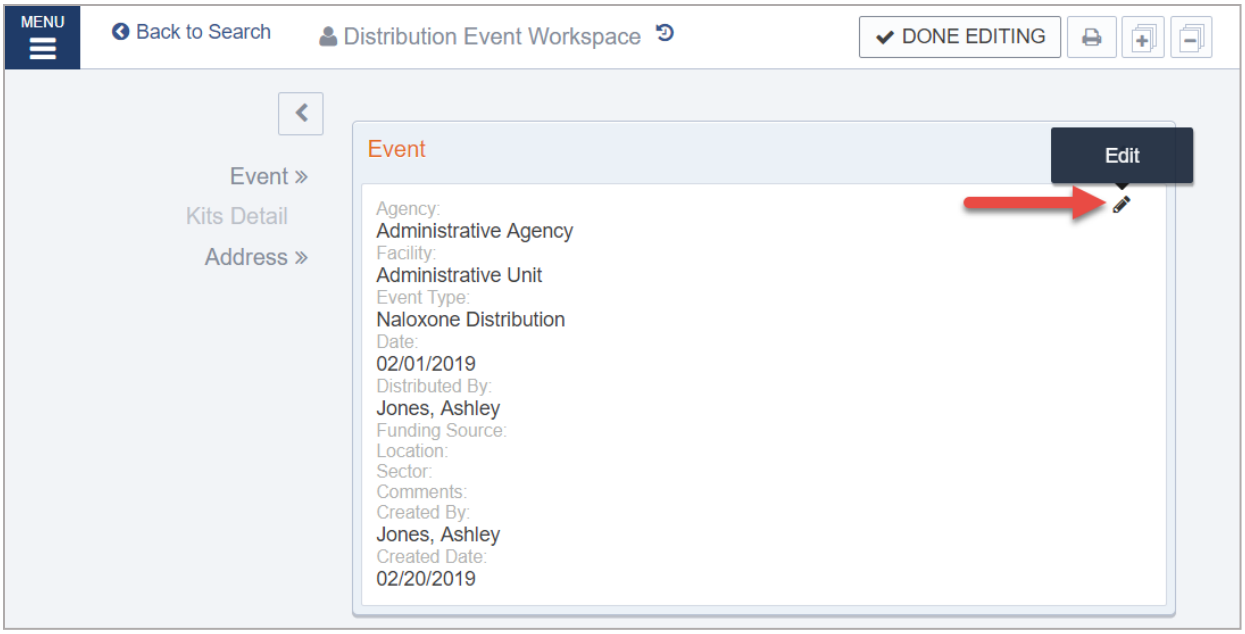


Figure 7-8: Distribution Event, edit Event panel

2. Enter information for this Distribution Event as shown in the table below.

Table 7-4: Distribution Event fields

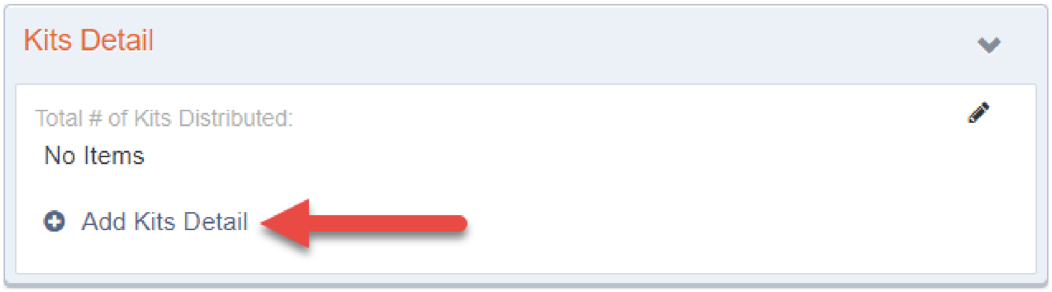
Field	Description
Agency	Read-only field.
Facility	Read-only field.
Event Type	Read-only field displaying Naloxone Distribution.
Date	Update the date as applicable.
Distributed By	Update the name as applicable.
Funding Source	(Optional) Select the funding source from the drop-down list.
Location	(Optional) Enter the location for this distribution event.
Sector	Select the applicable sector(s) for this distribution event.
Comments	(Optional) Type comments about this event as applicable.
Created By	Read-only field displaying the user account who created the record.
Created Date	Read-only field displaying the date the record was created.

3. Click **Save**.

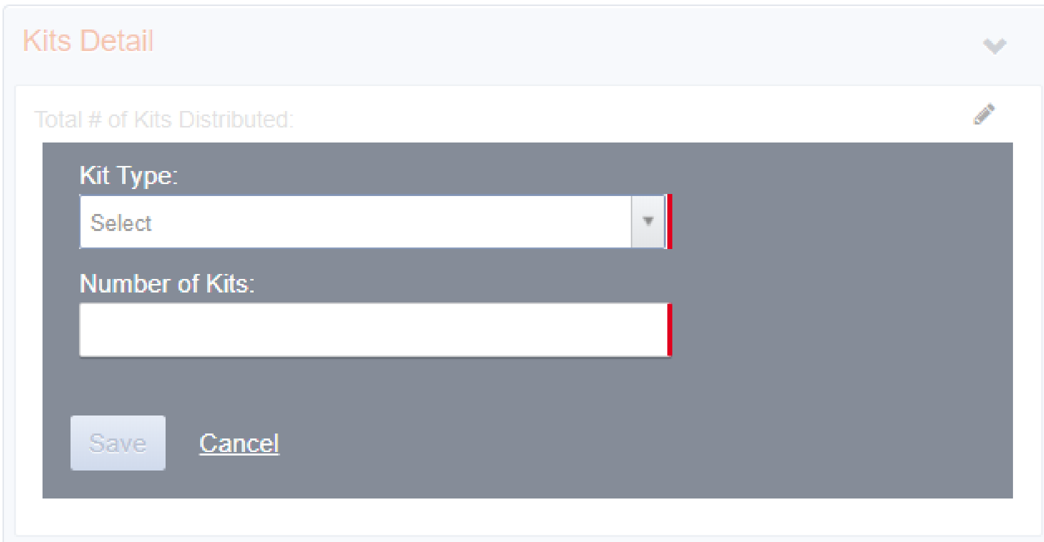
Panel: Kit Detail

Option 1: Add Kit Type

1. If you know the type(s) of kit(s) distributed, in the **Kits Detail** panel, click **Add Kit Detail**.



2. Select the **Kit Type** and the **Number of Kits**.



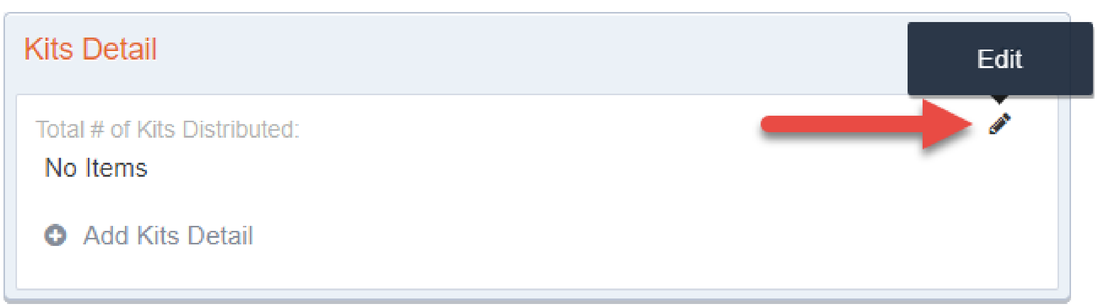
3. Click **Save**.

Option 2: Add Kit Number Only

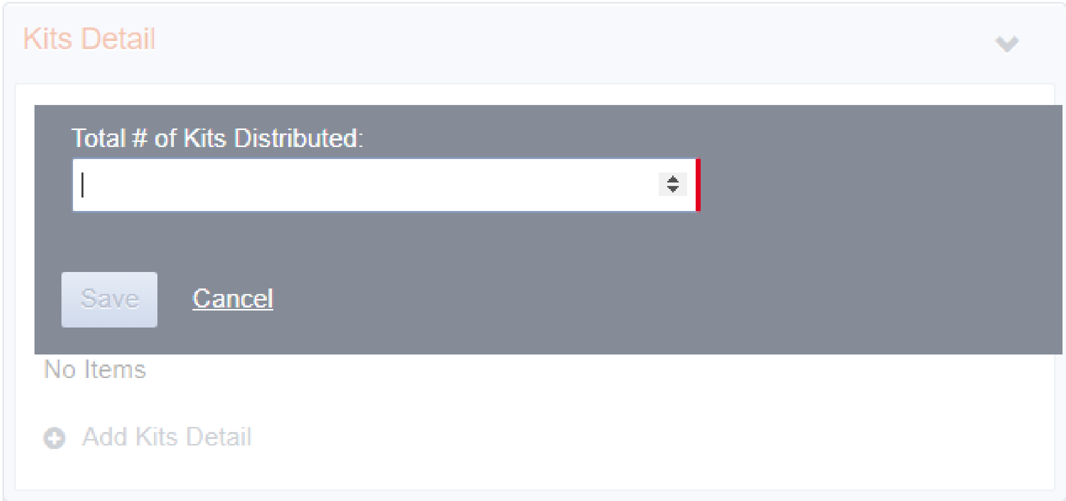
If you do not know the detail of kits that were distributed, you may directly enter the **Total # of Kits Distributed**.

> **Note**: If you later decide to add details for the kit(s) distributed, then the number entered in the field, **Total # of Kits Distributed**, will automatically be replaced by the total amount entered for the kit detail.

1. If you only know the number of kits distributed, in the **Kits Detail** panel, click the **pencil icon**.



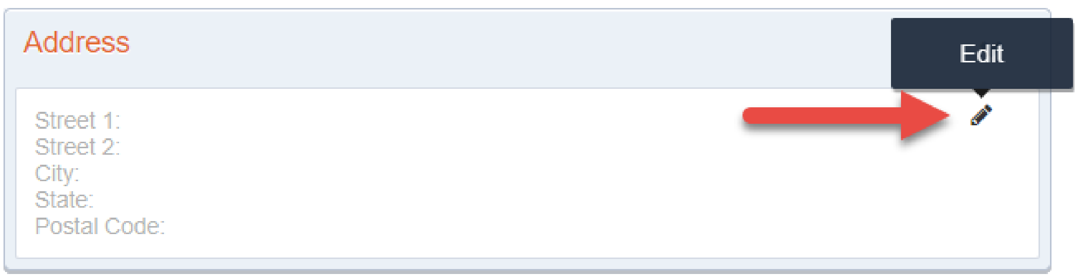
2. Type the number of kits distributed.



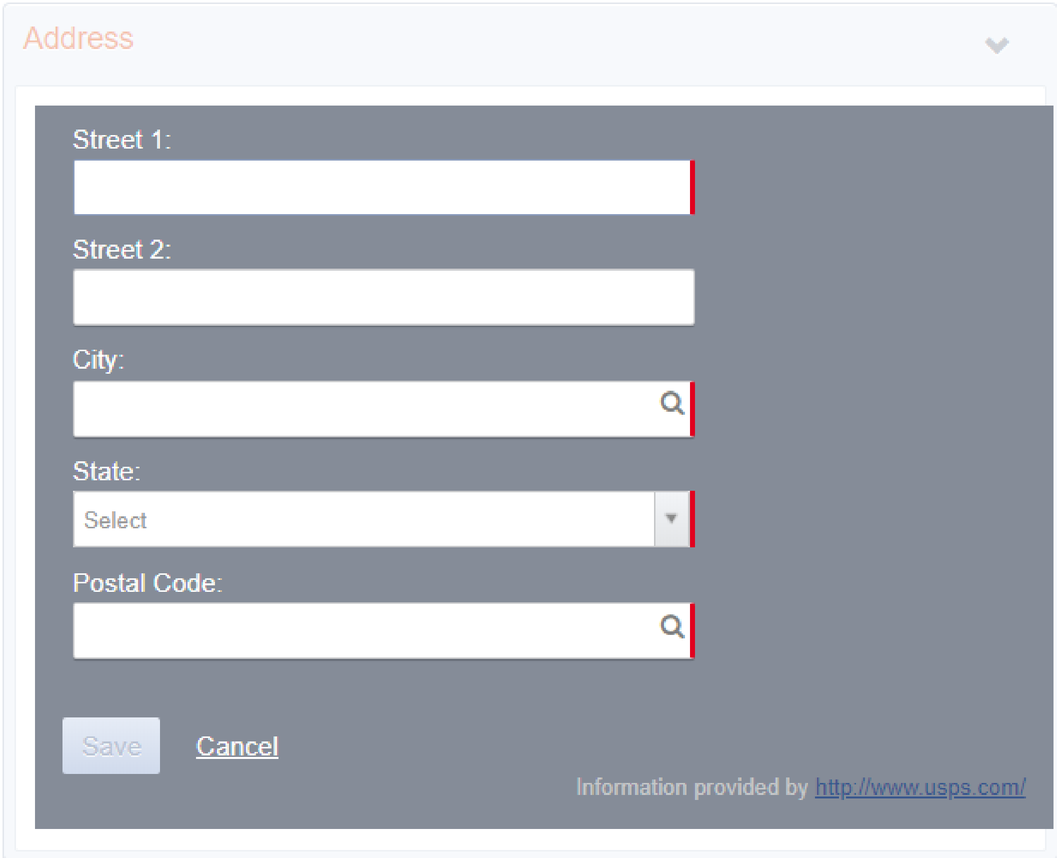
3. Click **Save**.

Panel: Address

1. On the **Distribution Event Workspace** screen, in the **Address** panel, click the **pencil icon** to edit the information.



2. Complete the address fields and then click **Save**.


Address
Street 1:
Street 2:
City:
State:
Select
Postal Code:
Save
Cancel
Information provided by http://www.usps.com/

Naloxone Administration

To record when Naloxone was administered, follow the steps below.

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. Click **Create New Overdose Reversal Kit Event**.
3. On the **Add Overdose Reversal Kit Event** dialog box, in the **Event Type** field, select **Naloxone Administration** from the drop-down list.

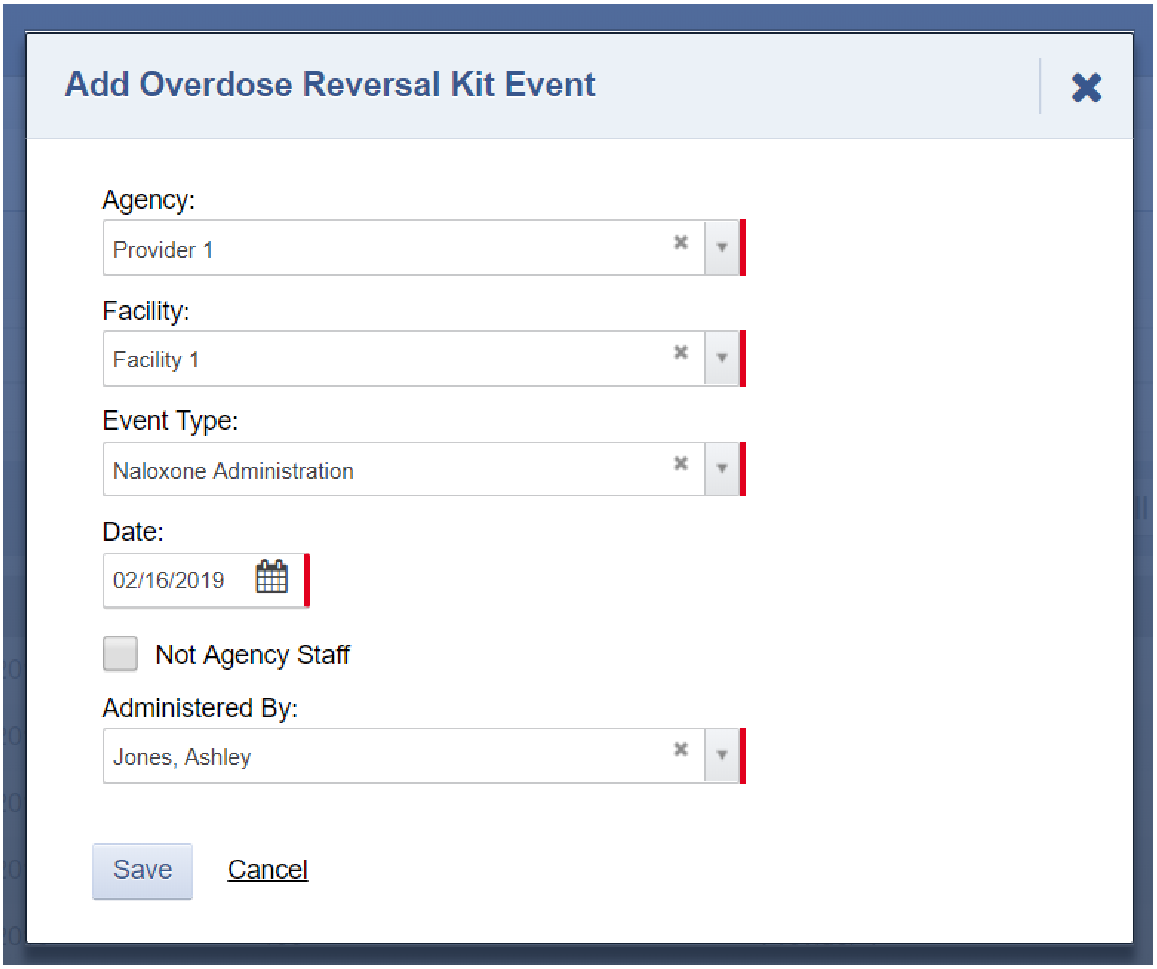


Figure 7-9: Add Overdose Reversal Kit Event dialog box, Naloxone Administration

4. Update the other fields as applicable. Click **Save**. This will open the Administration Event Workspace screen.

Panel: Event

1. On the **Administration Event Workspace** screen, in the **Event** panel, click the **pencil icon** to edit the event information.

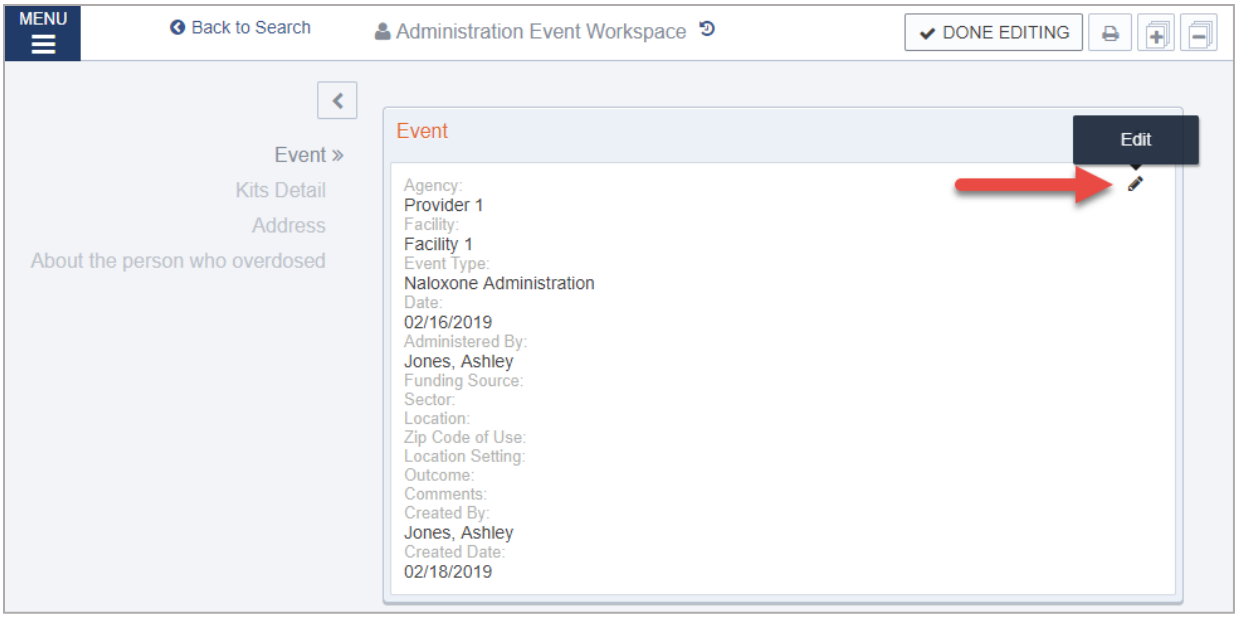


Figure 7-10: Administration Event, edit Event panel

2. Enter information for this Administration Event as shown in the table below.

Table 7-5: Administration Event fields

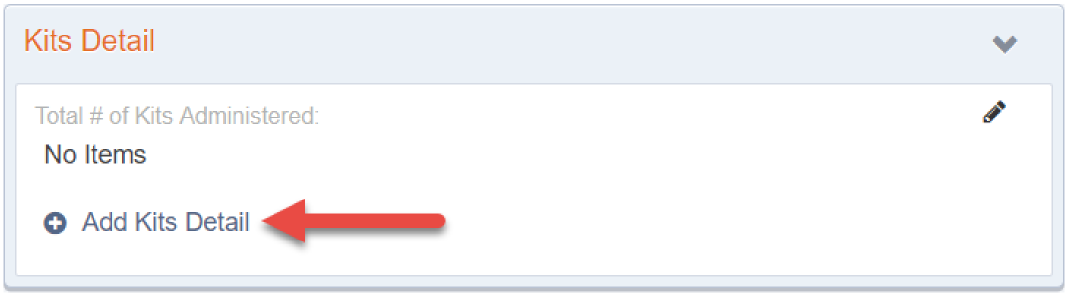
Field	Description
Agency	Read-only field.
Facility	Read-only field.
Event Type	Read-only field.
Date	Update the date as applicable.
Administered By	Update the name as applicable.
Funding Source	(Optional) Select the appropriate value from the drop-down list. SOR may be the funding source paying for this event.
Sector	Select one or more sectors from the left box by clicking the name of each sector. If “Other” is selected, complete the required field, **Other Description**.
Location	(Optional)
Zip Code of Use	(Optional)
Location Setting	Select an option from the drop-down list.
Outcome	Select an option from the drop-down list.
Comments	(Optional) Type comments about this event as applicable.
Created By	Read-only field displaying the user account who created the record.
Created Date	Read-only field displaying the date the record was created.

3. Click **Save**.

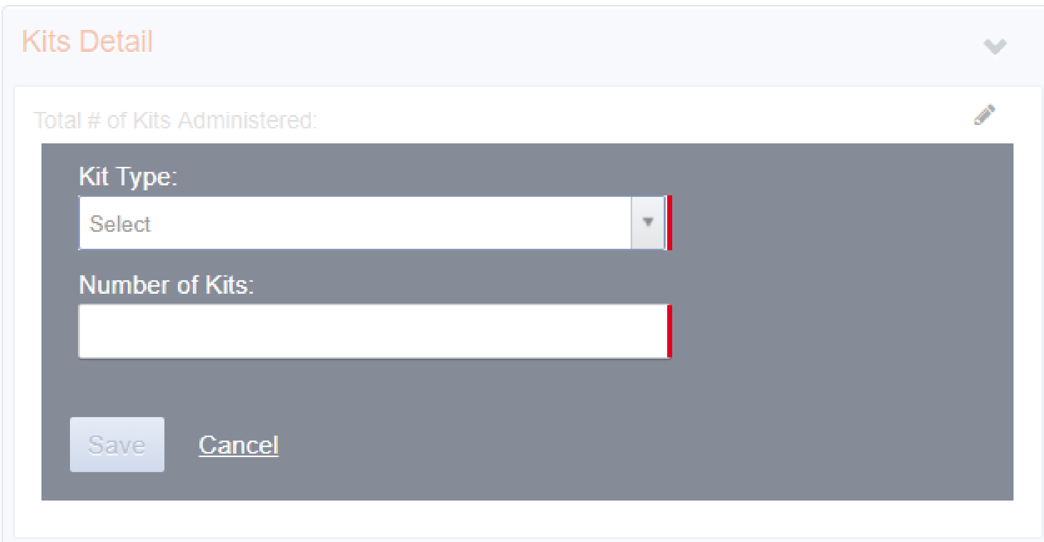
Panel: Kit Detail

Option 1: Add Kit Type

1. If you know the type(s) of kit(s) administered, in the **Kit Detail** panel, click **Add Kits Detail**.



2. Select the **Kit Type** and the **Number of Kits**.



3. Click **Save**.

Option 2: Add Kit Number Only

If you do not know the type of kit(s) administered, you may directly enter the **Total # of Kits Administered**.

Note: If you later decide to add details for the kit(s) administered, then the number entered in the field, **Total # of Kits Administered**, will automatically be replaced by the total amount entered for the kit detail.

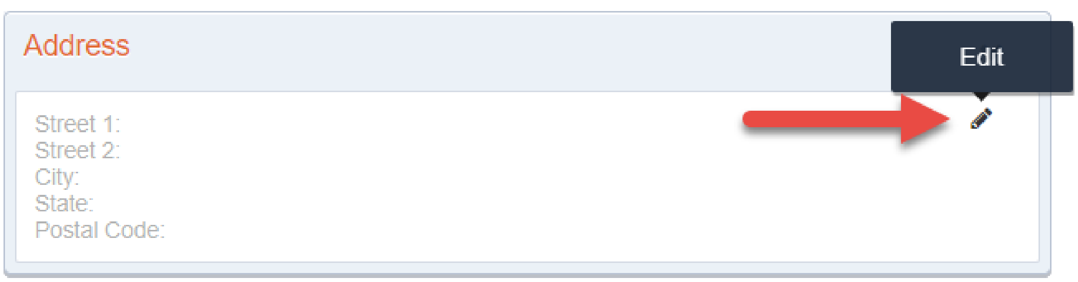
1. In the **Kits Detail** panel, click the **pencil icon**.

2. Type the number of kits administered.

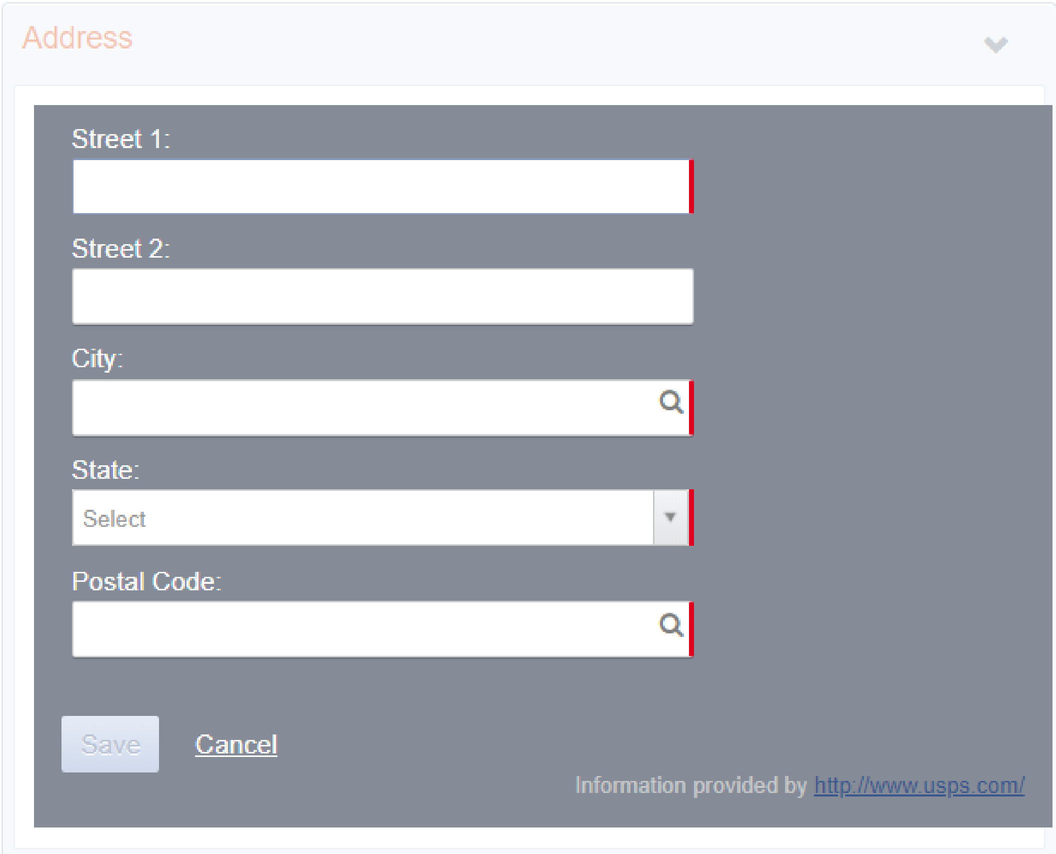
3. Click **Save**.

Panel: Address

1. On the **Administration Event Workspace** screen, in the **Address** panel, click the **pencil icon** to edit the information.



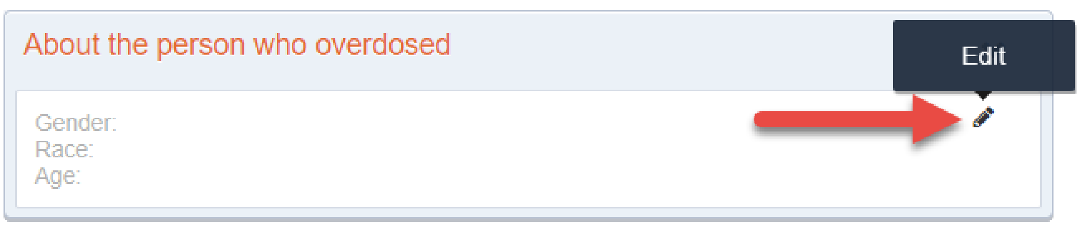
2. Complete the address fields and then click **Save**.



Panel: About the person who overdosed

On this panel, enter the Gender, Race, and Age of the person who overdosed.

1. On the **Administration Event Workspace** screen, in the **About the person who overdosed** panel, click the **pencil icon** to edit the information.



2. Complete the fields with information about the person who overdosed.


About the person who overdosed
Gender:
Select
Race:
Select
Age:
Save
Cancel

3. Click **Save**.

Linked Events

If the same agency has purchased kits and then distributed those kits, those records can be linked together. In addition, an Administration Event can be linked to a Distribution Event.

Note: Linked events allow information to prepopulate fields from one event to the next, and it opens the possibility for reporting across events. However, at this point there are no rules preventing the user from distributing more kits than were purchased, or administering more than was distributed.

Link a Distribution Event with a Purchase Event

To associate a Distribution Event with a Purchase Event, follow the steps below.

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. On the **Overdose Reversal Kit Event Search** screen, locate the desired Naloxone Purchase event.
3. Point the pencil icon, and then click **Add Naloxone Distribution Event**.

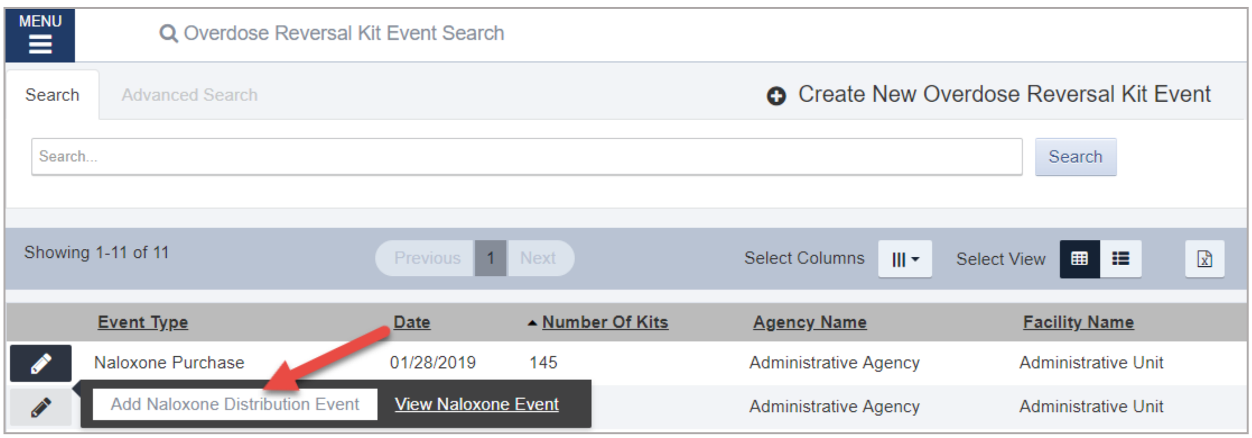


Figure 7-11: Add Linked Naloxone Distribution Event

4. On the **Add Linked Distribution Event** dialog box, review and update the fields as applicable, then click **Save**. This will open the Distribution Event Workspace screen.

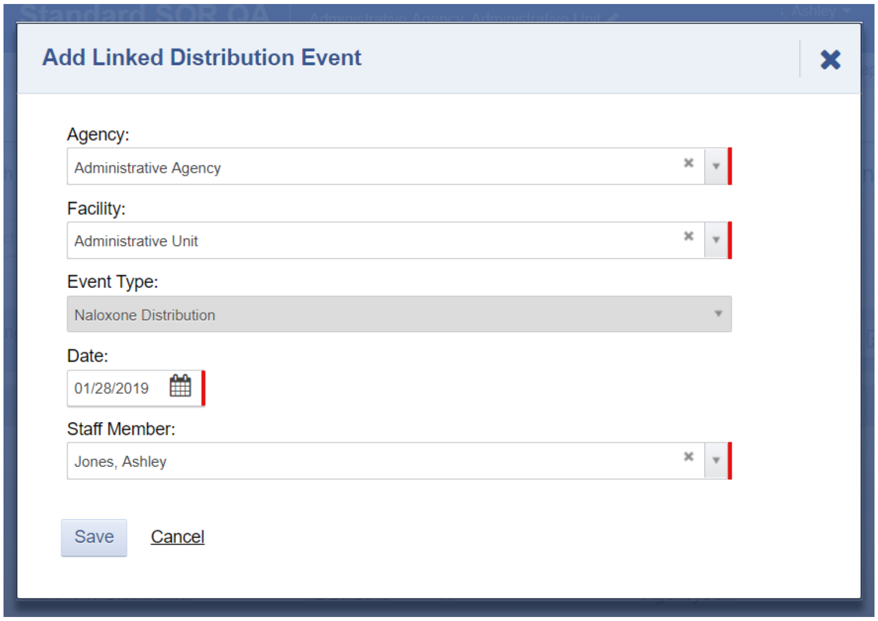


Figure 7-12: Add Linked Distribution Event dialog box

Panel: Event

For linked events, the Distribution Event panel will be prepopulated with information entered on the linked Purchase Event.

1. To update this information, in the **Event** panel, click the **Edit** icon.

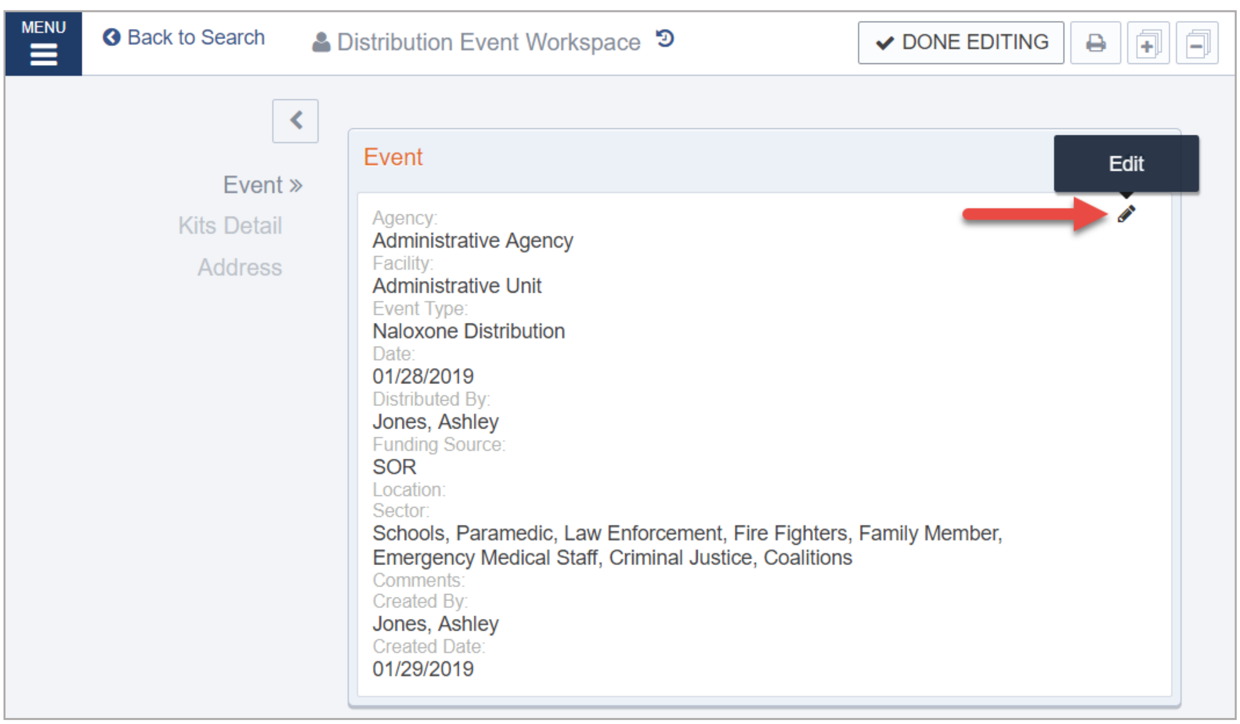


Figure 7-13: Linked Distribution Event, edit Event panel

2. Update the Event fields as applicable.

Table 7-6: Distribution Event fields

Field	Description
Agency	Read-only field.
Facility	Read-only field.
Event Type	Read-only field displaying Naloxone Distribution.
Date	Update the date as applicable.
Distributed By	Update the name as applicable.
Funding Source	(Optional) Defaults to the funding source selected on the linked Purchase Event.
Location	(Optional) Enter the location for this distribution event.
Sector	Update the selected sector(s) as applicable for this distribution event.
Comments	(Optional) Type comments about this event as applicable.
Created By	Read-only field displaying the user account who created the record.
Created Date	Read-only field displaying the date the record was created.

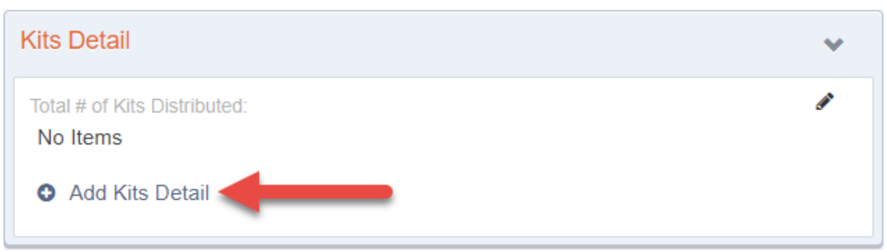
3. Click **Save**.

Panel: Kits Detail

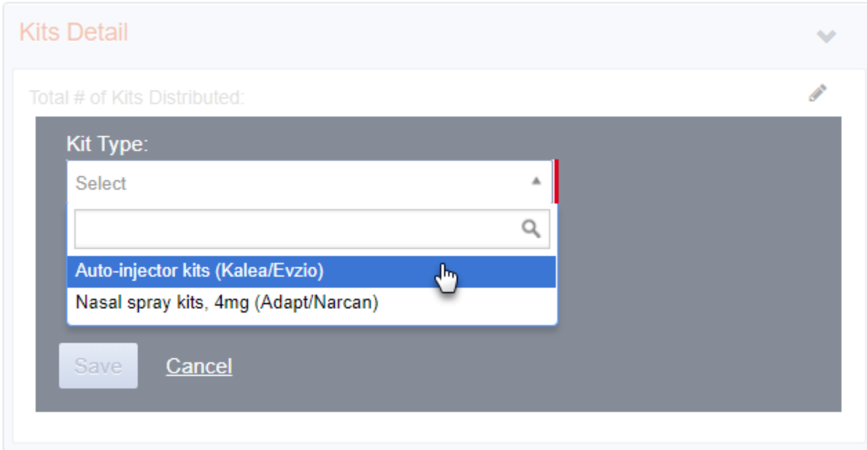
Since this Distribution Event is linked to a specific Purchase Event, the types of kits available to select are linked to those entered for that Purchase Event.

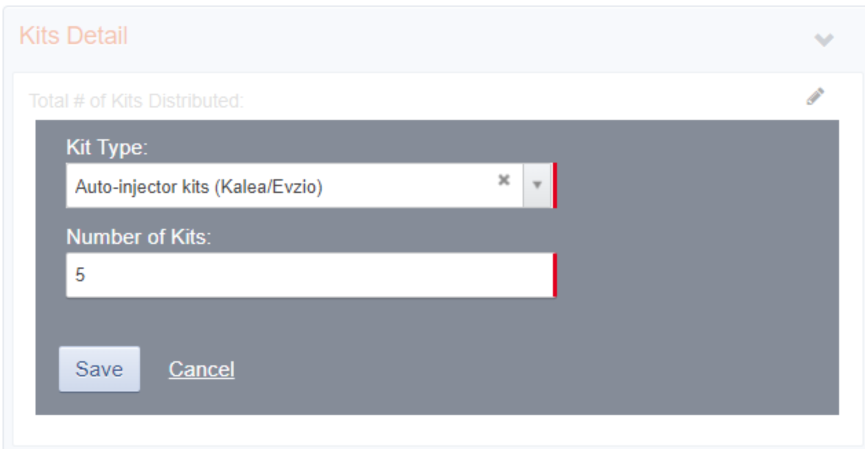
In the following example (shown in the screen captures below), two types of Naloxone kits were bought and recorded on a Purchase Event. By linking to this Purchase Event, the Distribution Event displays those two types of Naloxone kits within the Kit Type drop-down field.

1. To enter information about the kit, click **Add Kits Detail**.



2. On the Kits Detail panel, select the **Kit Type** and then enter the **Number of Kits** administered.

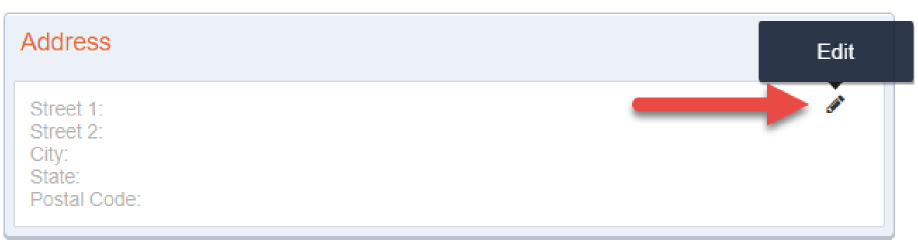




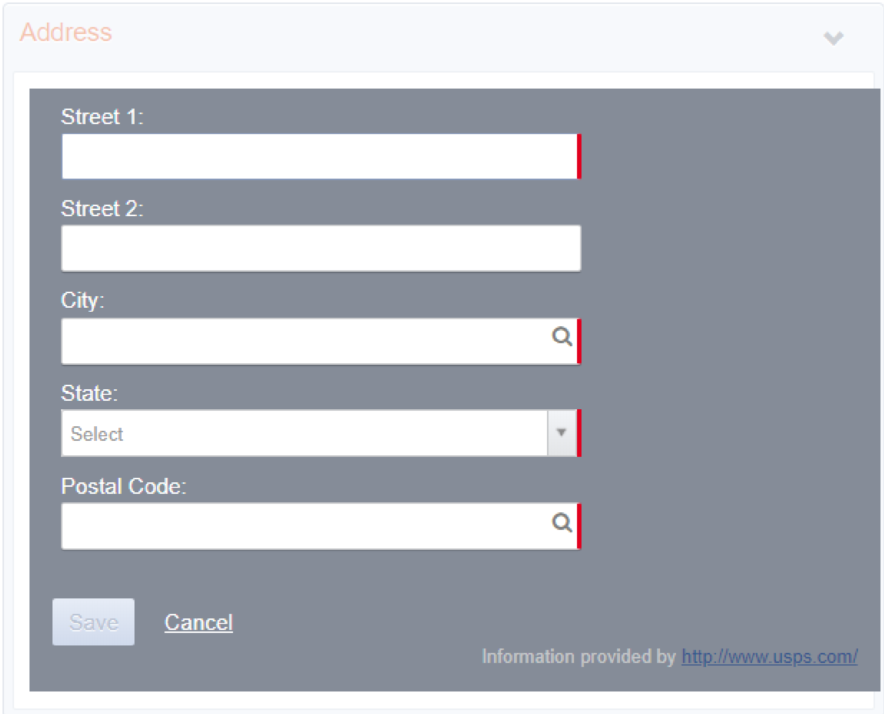
3. Click **Save**. Add additional kit types as applicable.

Panel: Address

1. On the **Distribution Event Workspace** screen, in the **Address** panel, click the **pencil icon** to edit the information.



2. Complete the address fields and then click **Save**.


Address
Street 1:
Street 2:
City:
State:
Select
Postal Code:
Save
Cancel
Information provided by http://www.usps.com/

Link a Naloxone Administration Event with a Distribution Event

To associate an Administration Event with a Distribution Event, follow the steps below.

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. On the **Overdose Reversal Kit Event Search** screen, locate the desired Naloxone Distribution event.
3. Point the pencil icon, and then click **Add Naloxone Administration Event**.

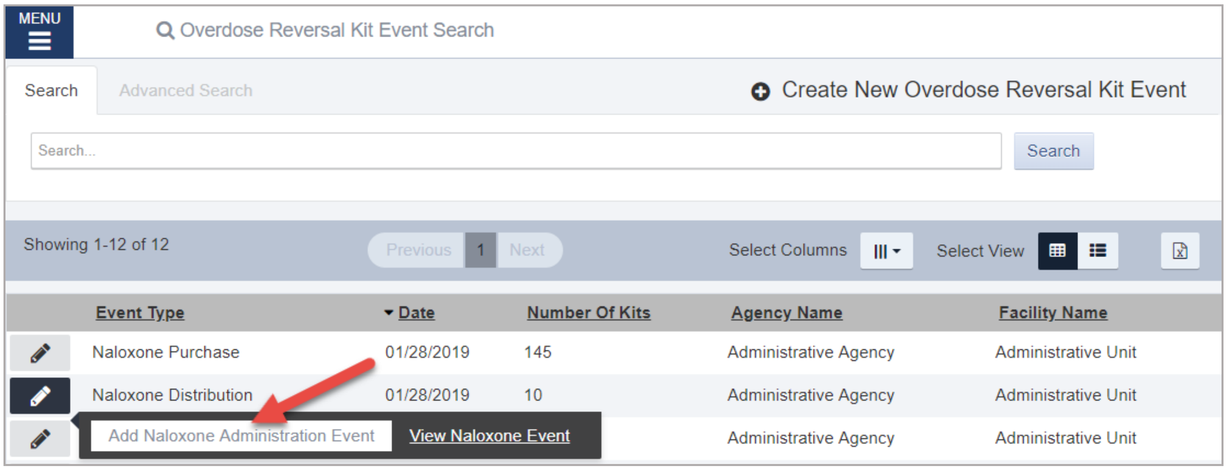


Figure 7-14: Add Naloxone Administration event to a Distribution event

4. On the **Add Linked Administration Event** dialog box, review and update the fields as applicable, and then click **Save**. This will open the Administration Event Workspace screen.

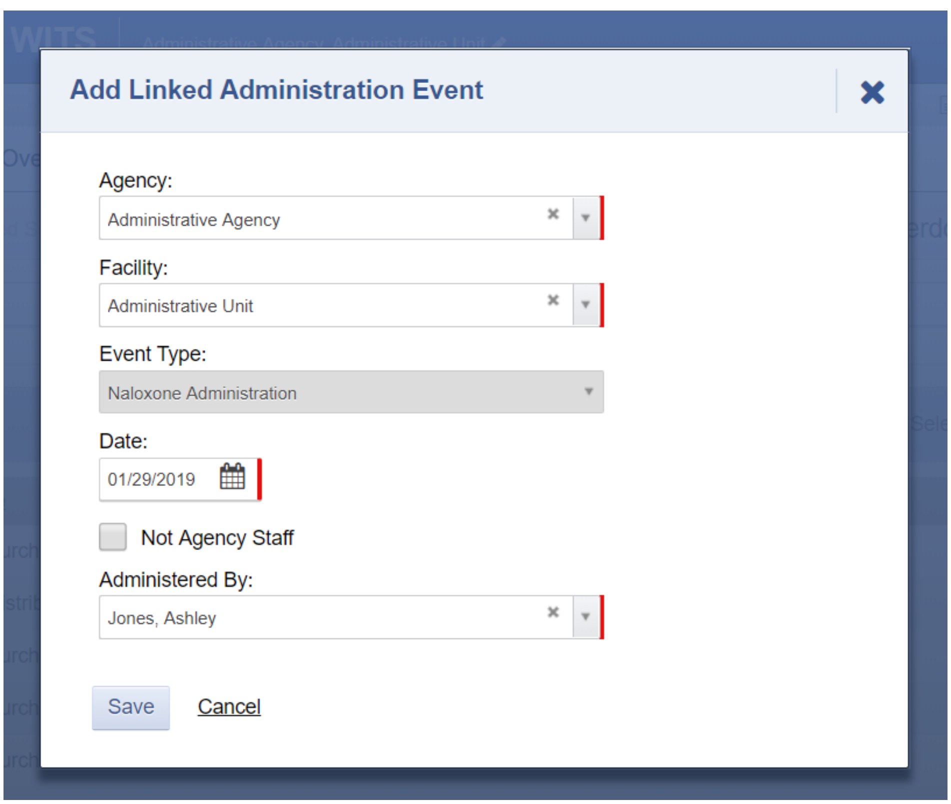


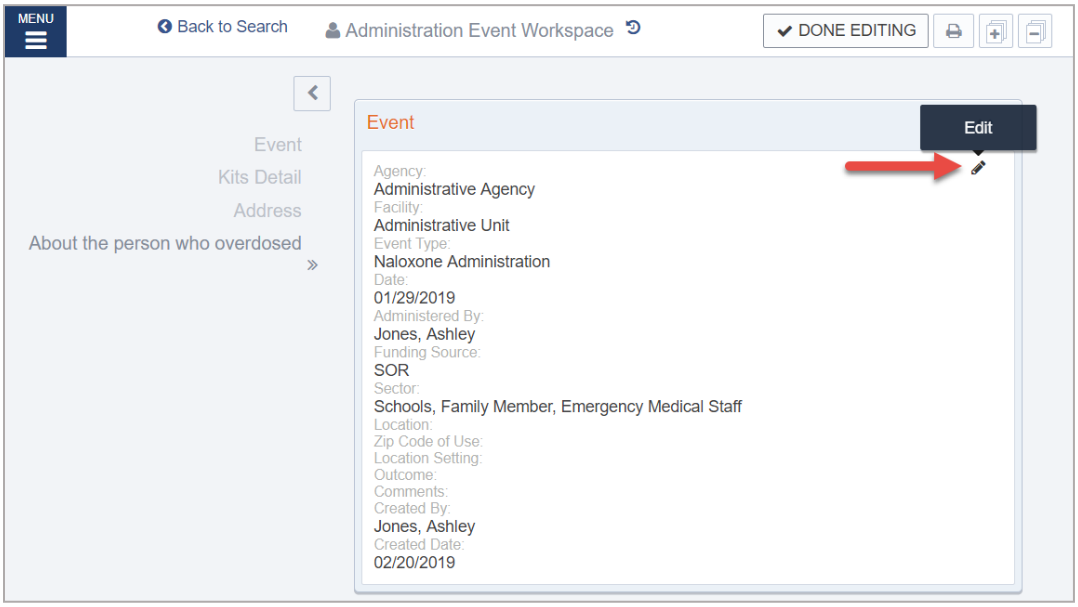
Figure 7-15: Linked Administration Event dialog box

Panel: Event

For linked events, information included in the Administration Event panel will be prepopulated using options selected on the linked Distribution Event.

Note: Linked events allow to prepopulate fields from one event to the next, and it opens the possibility for reporting across events. However, at this point there are no rules preventing the user from distributing more kits than were purchased, or administering more than was distributed.

1. To update event information, in the Event panel, click the **Edit** icon.



7-16: Linked Administration Event, edit Event panel

2. Update the Event fields as applicable, and then click **Save**.

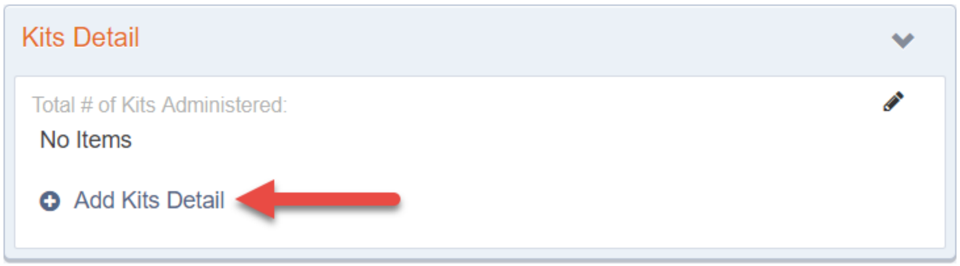
Table 7-7: Administration Event fields

Field	Description
Agency	Read-only field.
Facility	Read-only field.
Event Type	Read-only field.
Date	Update the date as applicable.
Administered By	Update the name as applicable.
Funding Source	(Optional) Defaults to the funding source selected on the linked Distribution Event.
Sector	Update the selected sector(s) as applicable for this administration event.
Location	(Optional)
Zip Code of Use	(Optional)
Location Setting	Select an option from the drop-down list.
Outcome	Select an option from the drop-down list.
Comments	(Optional) Type comments about this event as applicable.
Created By	Read-only field displaying the user account who created the record.

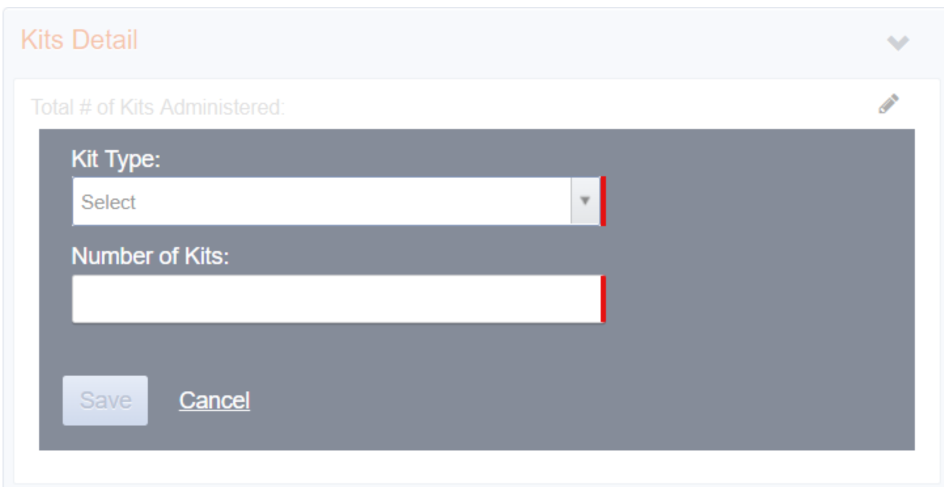
Field	Description
Created Date	Read-only field displaying the date the record was created.

Panel: Kits Detail

1. To enter information about the kit, click **Add Kits Detail**.



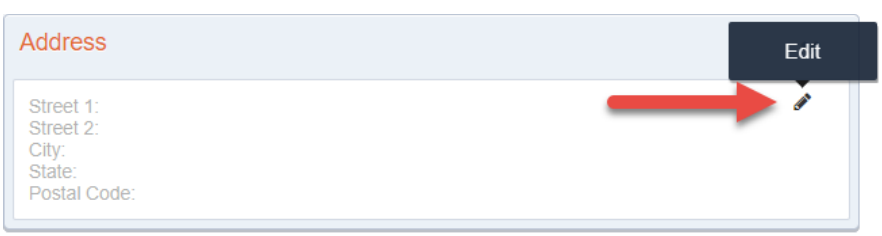
2. On the Kits Detail panel, select the **Kit Type** and then enter the **Number of Kits** administered.



3. Click **Save**.

Panel: Address

1. On the **Administration Event Workspace** screen, in the **Address** panel, click the **pencil icon** to edit the information.

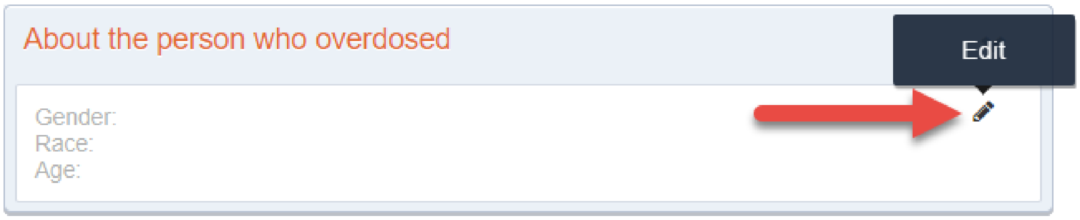


2. Complete the address fields and then click **Save**.

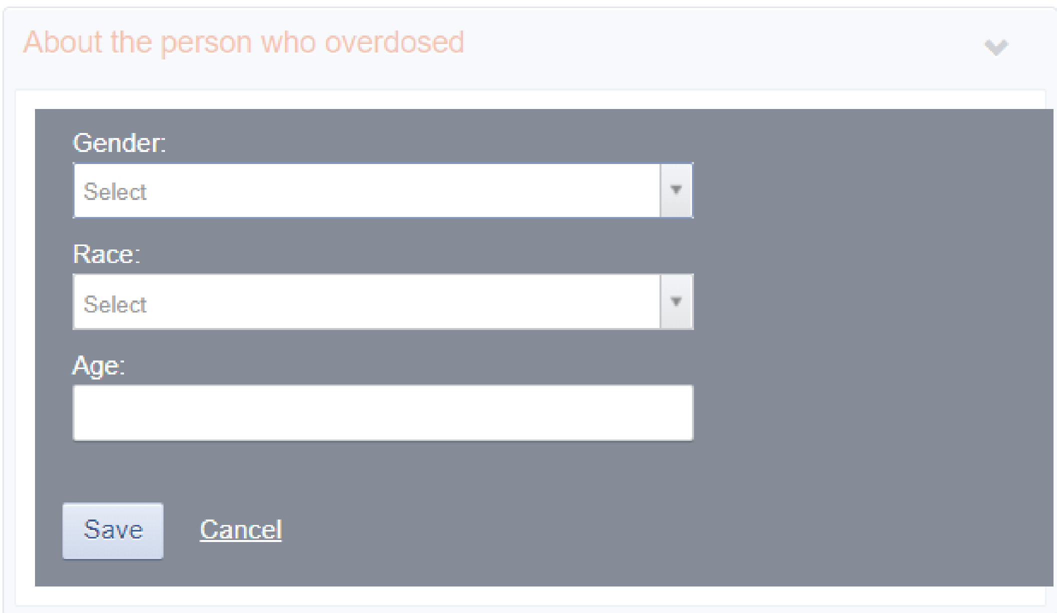
Panel: About the person who overdosed

On this panel, enter the Gender, Race, and Age of the person who overdosed.

1. On the **Administration Event Workspace** screen, in the **About the person who overdosed** panel, click the **pencil icon** to edit the information.



2. Complete the fields with information about the person who overdosed, and then click **Save**.



Review an Overdose Reversal Kit

If you need to review and/or edit an event that was previously entered, follow these steps:

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. On the **Overdose Reversal Kit Event Search** screen, locate the desired event to review.
3. Point the pencil icon, and then click **View Naloxone Event**.
4. On the Event Workspace, click the **Edit** button at the top in order to make the workspace editable.
5. Locate the panel(s) to update and click the associated pencil icon to make updates.